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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

September, 1988

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer
Governor

J. Randall Evans
Secretary

LABOR MARKET DIMENSIONS
SEPTEMBER, 1988

MARYLAND

JOBLESSNESS UNCHANGED

For the third consecutive month, Maryland's unemployment rate held steady at 4.2 percent in September. Last year, the jobless rate was slightly lower at 3.9 percent. A relatively stable unemployment rate is the norm for September. On average, since 1984 the variation in the statewide jobless rate between August and September has hovered at just 0.1 percentage points.

September's static jobless rate actually masked the overall level of activity in the job market over the month. Maryland's labor force, after rising by an estimated 3,400 persons during August, tightened significantly in September. The seasonal movement of summer workers out of the job market caused the number of active participants in the work force to decline by 12,855. Meanwhile, seasonal layoffs pulled the number of working Marylanders down by a slightly higher 12,903 persons over the month. The net result of September's labor market activity was a slight increase, of just 48 people, in the state's pool of unemployed workers.

The termination of seasonal employment and the exodus of summer workers from the job market is a normal occurrence in September. Another habitual happening, which is often obscured by this labor force exodus but is still worth mention, is the re-entrance and re-employment of state and local education-related personnel.

	September 1988	August 1988	September 1987
Civilian Labor Force	2,458,757	2,471,612	2,398,518
Total Employment	2,355,818	2,368,721	2,305,775
Total Unemployment	102,939	102,891	92,743
Unemployment Rate	4.2	4.2	3.9
National Civilian Unemployment Rate	5.2	5.4	5.7

Nationally, the civilian unemployment rate fell slightly over the month as seasonal workers left the job market. The U.S. rate, while declining by 0.2 percentage points to register 5.2 percent, continued to top Maryland's estimate by a full percentage point in September.

INDUSTRIAL PAYROLLS RESPOND TO SEASONAL SWINGS

Maryland's industrial payrolls rose by 13,300 jobs in September, reaching a level of 2,054,100. Last year, the August-September gain was limited to just 3,400 jobs. Although the recent upswing in industrial activity resulted more from recall activity rather than from actual new job generation, Maryland's economic track record has been reinforced by the addition of nearly 20,000 new jobs since last September.

In manufacturing, where trends tend to be relatively erratic, seasonal layoffs in preserved fruits and vegetables contributed to an employment slide of more than 200 jobs in the state's food processing industry. Aside from this seasonal downswing, the forecast in manufacturing was also clouded by the onset of three separate labor disputes in the durable goods sector which, when combined, adversely affected an estimated 450 workers. On the positive side, increased business activity induced gains of slightly more than 200 jobs in printing and publishing and an estimated 100 jobs in transportation equipment.

In the nonmanufacturing sector, much of the employment forecast was influenced by seasonal fluctuations. In government, recalls for the fall semester bolstered employment in educational facilities by an estimated 12,800 jobs during September. Meanwhile, layoffs of summer workers at federal and local government agencies slimmed payrolls by slightly more than 7,000 jobs.

Hiring in construction, although showing signs of tapering off, added nearly 1,000 jobs to the state's payrolls. Special trade contractors, the biggest gainer, accounted for nearly two-thirds of the overall industry increase. Employment gains in transportation were almost on par with those registered in construction. Trucking and air transportation contributed 100+ new jobs. Seasonal recalls of school bus drivers, however, provided the primary impetus for gains in the transportation sector.

Meanwhile, employment in the services industries receded by an estimated 650 jobs during September with the start of seasonal layoffs in hotels/lodging places, amusement/recreation services, membership organizations and agricultural services. On the up side, the onset of fall recalls boosted educational services by nearly 2,100 jobs. Additional hiring was also noted in health services and also in personal services.

A slight increase in wholesale trade employment during September was overwhelmed by layoffs of 2,500 in retail trade. For the most part, the end of the summer layoffs in eating and drinking places dominated the performance in the retail trade sector. Layoffs, although limited in extent, also occurred in general merchandise stores, auto dealers, and apparel/accessory stores. Also in September, layoffs of summer workers caused employment in the finance, insurance and real estate sector to drop by 500 jobs. Losses were most prevalent in banking and in credit agencies.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY
BY PLACE OF EMPLOYMENT
(in thousands)

SEPTEMBER 1988

Major Industry Grouping	September 1988	August 1988	September 1987
Total Nonagricultural Employment	2,054.1	2,040.8	2,035.3
Manufacturing	207.3	207.5	208.7
Durable Goods	108.7	109.1	110.5
Nondurable Goods	98.6	98.4	98.2
Nonmanufacturing	1,846.8	1,833.3	1,826.6
Mining	1.9	1.8	2.0
Construction	157.1	156.1	156.3
Transportation & Public Utilities	94.3	93.3	93.8
Wholesale & Retail Trade	525.0	527.4	522.5
Wholesale Trade	110.9	110.8	111.0
Retail Trade	414.1	416.6	411.5
Finance, Insurance & Real Estate	128.0	128.5	125.8
Services	552.0	552.7	546.0
Total Government	388.5	373.5	380.3
Federal	127.6	128.3	129.0
State	90.6	86.0	87.8
Local	170.3	159.2	163.5

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request.
Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

In the Baltimore Metropolitan Area, the jobless rate inched up slightly over the month, from 4.5 percent to 4.6 percent. Within the BMA, local unemployment rates ranged from a low of 2.5 percent in Carroll County to a high of 7.0 percent in Baltimore City. The BMA's industrial payrolls reacted similarly to those statewide, with the exception of the manufacturing and services sectors. While these industries declined statewide, an increase of 500 jobs was noted in the BMA's manufacturing payrolls and, in services, a gain of 600 jobs. In manufacturing, job gains posted in electronic equipment, printing/publishing, paper products, and transportation equipment contributed to the industry's overall performance. In services, recalls in educational services and increased activity in business services exerted the primary influence on the industry as a whole.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. suburbs, unemployment ebbed slightly, from 3.3 percent to 3.2 percent. Within the area, jobless rates declined in all the local jurisdictions with the exception of Prince George's County where unemployment rose negligibly from 3.7 percent to 3.8 percent. During September, the region's industrial payrolls rose by 8,500 jobs. While normal seasonal declines tapered payrolls in building materials/garden supplies, eating and drinking places, amusement services, and agricultural services, these declines were countered by gains in construction, general merchandise stores, educational services, and state and local government.

WESTERN MARYLAND

The unemployment rate in the western region stabilized in September, holding at the August rate of 6.7 percent. Last year's September jobless rate was noticeably higher at 7.4 percent. Although unemployment remained stable, overall employment in the region did decline over the month by an estimated 1,197 persons. However, the impact of this decline on the unemployment rolls was negligible due to an almost identical drop in the region's labor force. In Allegany County, the only western county to experience increased joblessness, the unemployment rate rose by 0.3 percentage points to register 8.4 percent in September. However, in absolute terms, this translated into an increase of less than 100 people on the county's unemployment rolls.

BALANCE OF STATE

Joblessness in the Balance of State area left 5.1 percent of the area's labor force idle during September, up from 5.0 percent in August. During September, seasonal employment declines were noted in food processing, hotels, amusement services, food stores, eating and drinking places, and real estate. Locally, in Kent County, an increase of nearly 300 people in the labor force was a factor in causing the county's unemployment rate to rise from 4.5 percent to 5.6 percent. Meanwhile, in Worcester County, the seasonal drop off in tourist activities signaled a rise in the county's jobless rate from 2.6 percent to 3.6 percent. Despite this increase, the county's jobless rate is still running below that of 4.0 percent recorded last September.

NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--SEPTEMBER 1988

Major Industry Grouping	Baltimore Metropolitan Area		Maryland Portion D.C. Suburbs		Western Maryland		Balance of State	
	Sept.1988	Aug. 1988	Sept.1988	Aug. 1988	Sept.1988	Aug. 1988	Sept.1988	Aug. 1988
Total Nonagricultural Employment	1092.9	1090.0	730.8	722.3	85.2	85.1	139.1	138.9
Manufacturing	131.2	130.7	35.8	36.0	16.2	16.3	24.4	24.7
Durable Goods	73.6	73.5	18.4	18.8	7.3	7.4	8.9	8.9
Nondurable Goods	57.6	57.2	17.4	17.2	8.9	8.9	15.5	15.8
Nonmanufacturing	961.7	959.3	695.0	686.3	69.0	68.8	114.7	114.2
Construction	76.0	76.0	64.3	63.7	6.0	5.6	10.1	10.1
Transportation & Public Utilities	53.3	52.9	27.7	28.1	5.4	5.4	7.4	7.3
Wholesale and Retail Trade	270.3	270.4	193.8	194.7	23.5	23.5	38.2	38.3
Wholesale Trade	64.7	64.7	35.2	35.4	-	-	-	-
Retail Trade	205.6	205.7	158.6	159.3	-	-	-	-
Finance, Insurance & Real Estate	75.6	76.2	43.0	43.3	3.1	3.1	5.3	5.5
Services and Mining	291.5	290.9	213.2	214.3	18.9	19.0	30.5	31.1
Total Government	195.0	192.9	153.0	142.2	12.1	12.2	23.2	21.9
Federal	49.6	50.0	67.5	67.8	1.7	1.7	6.1	6.2
State	62.1	62.6	18.5	14.7	3.9	3.9	4.5	3.9
Local	83.3	80.3	67.0	59.7	6.5	6.6	12.6	11.8

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

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BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

SEPTEMBER, 1988

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	SEPTEMBER	AUGUST*	SEPTEMBER	AUGUST*	SEPTEMBER	AUGUST*	SEPTEMBER	AUGUST*	SEPT.'87
MARYLAND	2,458,757	2,471,612	2,355,818	2,368,721	102,939	102,891	4.2	4.2	3.9
BALTIMORE METROPOLITAN AREA	1,176,836	1,182,307	1,122,754	1,128,935	54,082	53,372	4.6	4.5	4.2
BALTIMORE CITY	345,419	346,714	321,150	322,918	24,269	23,796	7.0	6.9	6.6
ANNE ARUNDEL	209,367	210,869	202,933	204,051	6,434	6,818	3.1	3.2	3.0
BALTIMORE	382,544	384,033	366,924	368,944	15,620	15,089	4.1	3.9	3.6
CARROLL	59,077	59,436	57,577	57,894	1,500	1,542	2.5	2.6	3.2
HARFORD	78,060	78,175	74,607	75,018	3,453	3,157	4.4	4.0	3.5
HOWARD	87,638	88,293	85,270	85,740	2,368	2,553	2.7	2.9	2.3
QUEEN ANNE'S	14,731	14,787	14,292	14,371	439	416	3.0	2.8	3.2
D. C. AREA	976,353	979,331	944,752	947,066	31,601	32,265	3.2	3.3	2.9
CALVERT	21,719	21,967	20,903	20,954	816	1,013	3.8	4.6	3.7
CHARLES	45,627	46,005	44,272	44,381	1,355	1,624	3.0	3.5	2.8
FREDERICK	73,702	74,318	71,670	71,845	2,032	2,473	2.8	3.3	2.8
MONTGOMERY	414,649	415,702	403,348	404,336	11,301	11,366	2.7	2.7	2.4
PRINCE GEORGE'S	420,656	421,339	404,559	405,550	16,097	15,789	3.8	3.7	3.5
WESTERN MARYLAND	99,966	101,157	93,229	94,426	6,737	6,731	6.7	6.7	7.4
ALLEGANY	32,016	32,236	29,323	29,632	2,693	2,604	8.4	8.1	10.0
GARRETT	12,195	12,595	11,242	11,570	953	1,025	7.8	8.1	7.0
WASHINGTON	55,755	56,326	52,664	53,224	3,091	3,102	5.5	5.5	5.9
BALANCE OF STATE	205,602	208,818	195,083	198,295	10,519	10,523	5.1	5.0	4.4
CAROLINE	14,105	14,044	13,639	13,454	466	590	3.3	4.2	4.3
CECIL	34,916	34,985	32,211	32,317	2,705	2,668	7.7	7.6	4.5
DORCHESTER	17,424	17,641	16,552	16,753	872	888	5.0	5.0	4.7
KENT	9,344	9,078	8,822	8,674	522	404	5.6	4.5	3.6
ST. MARY'S	36,466	36,763	34,672	35,083	1,794	1,680	4.9	4.6	4.6
SOMERSET	11,542	11,586	10,776	10,836	766	750	6.6	6.5	5.7
TALBOT	16,456	16,380	16,081	15,665	375	715	2.3	4.4	2.9
WICOMICO	41,268	40,396	39,105	38,297	2,163	2,099	5.2	5.2	4.6
WORCESTER	24,081	27,945	23,225	27,216	856	729	3.6	2.6	4.0
[1] UNITED STATES	121,842,000	123,396,000	115,474,000	116,737,000	6,368,000	6,659,000	5.2	5.4	5.7

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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October, 1988

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LABOR MARKET DIMENSIONS
OCTOBER, 1988

MARYLAND

UNEMPLOYMENT HEADS UP

Maryland's unemployment rate, which had been holding steady at 4.2 percent since July, moved upward by 0.4 percentage points to register 4.6 percent in October. The increase in the October jobless rate is quite atypical when likened to the labor market experience of prior years. Last year, for example, the statewide unemployment rate declined slightly during October. Since the impact of seasonality on monthly unemployment estimates often extends beyond the scope of normal expectations, it is much too early to predict with any certainty whether the movement in October's labor market activity is merely an inexplicable aberration or the beginning of a trend.

The statewide labor force, after declining by nearly 10,000 persons in September, headed back up in October with the addition of an estimated 17,312 persons. Although employment also climbed to a level of 2,364,230, the increasing job demands created by a rapidly expanding labor force undermined the monthly employment gains of 5,441 persons. The interaction of these forces increased the unemployment burden, causing the statewide jobless rolls to rise to 114,969 in October, up from 103,098 in September.

	October 1988	September 1988	October 1987
Civilian Labor Force	2,479,199	2,461,887	2,413,101
Total Employment	2,364,230	2,358,789	2,321,156
Total Unemployment	114,969	103,098	91,945
Unemployment Rate	4.6	4.2	3.8
National Civilian Unemployment Rate	5.0	5.2	5.7

In spite of the increase in the jobless rate during October, the overall economic performance in the state during 1988 has been encouraging. Since January, 1988, residential employment has risen by nearly 85,000 workers and the jobless count has declined by an estimated 8,900 persons.

On average, jobseekers across the nation fared slightly better than those in Maryland during October. Over the month, the number of American workers rose by 776,000 persons. Meanwhile, the national jobless rolls declined by 186,000 persons, signaling a drop in the unemployment rate from 5.2 percent in September to 5.0 percent in October.

OCTOBER'S FORECAST MIXED BY UPS AND DOWNS

Maryland's survey of businesses showed an average rise of an estimated 11,600 jobs during October. Continuing recall activity in education provided the primary impetus for this increase, however, job gains were scattered throughout the industrial spectrum.

Services, although a distant second to state and local government in terms of employment expansion, added an estimated 1,700 jobs during October. While seasonal declines continued to taper payrolls in hotels, amusement services, and agricultural services, recall activity in educational services and increased hiring in personal, business, and health services more than compensated for these seasonal layoffs.

Employment in construction also advanced during October, following closely behind services with a gain of 1,500 jobs. Within the industry, however, performance was mixed. Although activity on heavy construction projects began to wind down in anticipation of the upcoming winter season, the overall performance of the sector was determined by an increase in hiring activity among special trade contractors.

During October, employment in trade establishments dropped back by 100 jobs. In eating and drinking establishments, the culmination of summer layoffs was, in large part, responsible for the loss of slightly more than 2,800 jobs. The full impact of these losses, however, was cushioned by the onset of pre-holiday hiring in general merchandise and apparel stores. Additional hiring also occurred in food stores and furniture and home furnishing stores.

Meanwhile, in the finance, insurance, and real estate sector, the seasonal slump in real estate activity contributed to an overall industry decline of 600 jobs during October.

Manufacturing also had its share of winners and lossers during October. The industry as a whole posted losses of 600 jobs. At the same time, both the hourly and weekly earnings of the industry's production workers remained unchanged over the month. Cutbacks in primary metals, transportation equipment, nonelectrical machinery, and food and kindred products contributed to a downswing in October. The depth of the overall decline in manufacturing, however, was minimized somewhat by gains in electronic equipment, printing and publishing, and rubber and plastic products.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY
BY PLACE OF EMPLOYMENT
(in thousands)

OCTOBER 1988

Major Industry Grouping	October 1988	September 1988	October 1987
Total Nonagricultural Employment	2,069.1	2,057.5	2,043.2
Manufacturing	207.2	207.6	207.6
Durable Goods	108.6	109.0	110.4
Nondurable Goods	98.6	98.6	97.2
Nonmanufacturing	1,861.9	1,849.9	1,835.6
Mining	1.9	1.9	1.9
Construction	158.9	157.4	157.0
Transportation & Public Utilities	94.0	94.1	93.7
Wholesale & Retail Trade	525.5	525.6	522.7
Wholesale Trade	110.7	110.7	110.7
Retail Trade	414.8	414.9	412.0
Finance, Insurance & Real Estate	128.0	128.6	125.5
Services	553.1	551.4	543.0
Total Government	400.5	390.9	391.8
Federal	127.7	127.8	128.7
State	92.6	91.0	91.2
Local	180.2	172.1	171.9

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request.
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REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

During October, nearly two-thirds of the statewide increase in unemployment was reflected in the Baltimore Metropolitan Area. The increase in the BMA's jobless rolls occurred despite a gain of nearly 2,600 in the number of workers recorded between September and October. For the region as a whole, joblessness rose from 4.6 percent to 5.2 percent. All of the region's local jurisdictions, with the exception of Queen Anne's County where unemployment held steady at 3.0 percent, experienced increased joblessness. During October, layoffs were noted in manufacturing and services, however, these losses were countered by gains in education, retail trade, and construction.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. suburbs, unemployment also advanced, but to a much lesser degree. Joblessness in the region reached 3.4 percent in October, up from 3.2 percent in September. Although seasonal declines did blot the region's industrial payrolls, the full impact of these declines was cushioned somewhat by increased hiring activity in trucking, general merchandise stores and apparel stores, special trade contractors, business services, and state and local education.

WESTERN MARYLAND

Labor market activity in Western Maryland during October also showed signs of increasing joblessness. Over the month, the addition of an estimated 249 workers to the region's jobless rolls caused the area's unemployment rate to rise to 7.0 percent in October, up from 6.8 percent in September. Last year's estimate was slightly lower at 6.7 percent. Seasonal employment declines impacted negatively upon performance in the region's services sector during October. Losses were also noted in manufacturing, particularly in apparel and textiles and in leather products. On the up side, recall activity continued to boost employment in educational institutions and construction payrolls added 100+ jobs over the month.

BALANCE OF STATE

Joblessness in the Balance of State left 5.9 percent of the area's work force idle during October, up from 5.0 percent in September. The region's industrial payrolls declined by an estimated 1,200 jobs during October, with losses most pronounced in eating and drinking places, hotels, and amusement services. Unemployment escalated in all of the shore counties, with the exception of Cecil and Kent. Somerset and Worcester, the counties in the region most affected by seasonal employment related to tourism, agriculture, and outdoor related activities, experienced the largest increases in jobless rates. In Worcester, in particular, the final wrap-up of seasonal activity in Ocean City caused the jobless rate to rise to 7.7 percent, more than doubling that of 3.6 percent recorded in September.

NONAGRICULTURAL PAYROLL EMPLOYMENT1 BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--OCTOBER 1988

Major Industry Grouping	Baltimore Metropolitan Area		Maryland Portion D.C. Suburbs		Western Maryland		Balance of State	
	Oct. 1988	Sept.1988	Oct. 1988	Sept.1988	Oct. 1988	Sept.1988	Oct. 1988	Sept.1988
Total Nonagricultural Employment	1101.8	1093.2	737.0	730.0	85.4	85.4	137.8	139.0
Manufacturing	130.8	130.9	36.0	35.8	16.2	16.3	24.2	24.4
Durable Goods	72.8	73.1	18.6	18.4	7.4	7.4	8.8	8.9
Nondurable Goods	58.0	57.8	17.4	17.4	8.8	8.9	15.4	15.5
Nonmanufacturing	971.0	962.3	701.0	694.2	69.2	69.1	113.6	114.6
Construction	76.0	75.7	64.4	63.9	6.1	6.0	10.1	10.1
Transportation & Public Utilities	53.2	53.3	28.1	27.7	5.3	5.3	7.4	7.4
Wholesale and Retail Trade	271.7	269.3	195.8	194.2	23.6	23.6	37.7	38.2
Wholesale Trade	64.9	64.8	35.2	35.3	-	-	-	-
Retail Trade	206.8	204.5	160.6	158.9	-	-	-	-
Finance, Insurance & Real Estate	75.5	75.6	43.0	43.1	3.1	3.1	5.2	5.2
Services and Mining	291.1	291.5	213.3	213.1	18.6	19.0	29.2	30.4
Total Government	203.5	196.9	156.4	152.2	12.5	12.1	24.0	23.3
Federal	49.3	49.6	67.6	67.6	1.7	1.7	6.1	6.1
State	62.6	63.0	19.8	18.4	3.9	3.9	4.9	4.5
Local	91.6	84.3	69.0	66.2	6.9	6.5	13.0	12.7

1The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

OCTOBER, 1988

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCT.'87
MARYLAND	2,479,199	2,461,887	2,364,230	2,358,789	114,969	103,098	4.6	4.2	3.8
BALTIMORE METROPOLITAN AREA	1,189,492	1,179,289	1,127,538	1,124,940	61,954	54,349	5.2	4.6	4.2
BALTIMORE CITY	350,360	346,206	322,518	321,775	27,842	24,431	7.9	7.1	6.6
ANNE ARUNDEL	211,268	209,795	203,798	203,329	7,470	6,466	3.5	3.1	2.9
BALTIMORE	386,514	383,309	368,487	367,638	18,027	15,671	4.7	4.1	3.6
CARROLL	59,483	59,199	57,823	57,689	1,660	1,510	2.8	2.6	3.1
HARFORD	78,648	78,201	74,925	74,752	3,723	3,449	4.7	4.4	3.5
HOWARD	88,428	87,815	85,634	85,436	2,794	2,379	3.2	2.7	2.2
QUEEN ANNE'S	14,791	14,762	14,353	14,320	438	442	3.0	3.0	2.6
D. C. AREA	982,384	977,746	948,550	946,017	33,834	31,729	3.4	3.2	2.8
CALVERT	21,914	21,763	20,987	20,931	927	832	4.2	3.8	3.7
CHARLES	45,926	45,709	44,450	44,332	1,476	1,377	3.2	3.0	2.7
FREDERICK	74,103	73,800	71,958	71,766	2,145	2,034	2.9	2.8	3.0
MONTGOMERY	416,918	415,270	404,969	403,888	11,949	11,382	2.9	2.7	2.3
PRINCE GEORGE'S	423,521	421,206	406,185	405,101	17,336	16,105	4.1	3.8	3.3
WESTERN MARYLAND	99,966	99,560	92,977	92,820	6,989	6,740	7.0	6.8	6.7
ALLEGANY	31,980	31,910	29,225	29,213	2,755	2,697	8.6	8.5	9.3
GARRETT	12,265	12,135	11,251	11,189	1,014	946	8.3	7.8	6.7
WASHINGTON	55,721	55,515	52,501	52,418	3,220	3,097	5.8	5.6	5.3
BALANCE OF STATE	207,355	205,292	195,164	195,012	12,191	10,280	5.9	5.0	4.7
CAROLINE	14,376	14,094	13,631	13,631	745	463	5.2	3.3	3.7
CECIL	34,735	34,686	32,580	32,231	2,155	2,455	6.2	7.1	5.0
DORCHESTER	17,727	17,414	16,624	16,538	1,103	876	6.2	5.0	4.3
KENT	9,706	9,349	9,322	8,825	384	524	4.0	5.6	3.9
ST. MARY'S	37,671	36,458	35,740	34,661	1,931	1,797	5.1	4.9	3.9
SOMERSET	11,763	11,539	10,812	10,775	951	764	8.1	6.6	6.5
TALBOT	17,409	16,447	16,670	16,071	739	376	4.2	2.3	3.0
WICOMICO	42,717	41,249	40,174	39,079	2,543	2,170	6.0	5.3	5.0
WORCESTER	21,251	24,056	19,611	23,201	1,640	855	7.7	3.6	6.8
[1] UNITED STATES	122,432,000	121,842,000	116,250,000	115,474,000	6,182,000	6,368,000	5.0	5.2	5.7

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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Department of Economic & Employment Development
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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

November, 1988

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer
Governor

J. Randall Evans
Secretary

LABOR MARKET DIMENSIONS
NOVEMBER, 1988

MARYLAND

UNEMPLOYMENT HEADS DOWNWARD

The slight apprehension which surfaced in October when the jobless rate took an unexpected upturn eased somewhat with the downward movement in November's unemployment estimate. Joblessness in the state dropped back from 4.6 percent in October to 4.4 percent in November, a decline which helped to erase a portion of the 0.4 percentage point increase that occurred in October.

Last year, the jobless rate in November, although lower at 4.0 percent, increased over the month by 0.2 percentage points.

Maryland's lower jobless rate was triggered not only by an increase in the number of working residents but also by a decline in the labor force. During November, the number of workers on the statewide employment rolls increased to 2,370,284, reflecting a gain of nearly 2,900 persons. Meanwhile, the overall number of participants in the labor market declined from 2,482,462 to 2,478,642. The net result of November's labor market activity was a decline, of an estimated 6,700 people, in the state's pool of unemployed workers.

	November 1988	October 1988	November 1987
Civilian Labor Force	2,478,642	2,482,462	2,415,599
Total Employment	2,370,284	2,367,404	2,319,333
Total Unemployment	108,358	115,058	96,266
Unemployment Rate	4.4	4.6	4.0
National Civilian Unemployment Rate	5.2	5.0	5.6

The direction of labor market activity in Maryland during November followed a different path than that nationwide. Contrary to statewide trends, unemployment across the nation rose by 0.2 percentage points to register 5.2 percent in November. Although the number of workers nationwide rose over the month, the increasing job demands created by an expanding labor force undermined the monthly employment gains, causing joblessness to rise.

INDUSTRIAL PAYROLLS REFLECT SEASONAL ADJUSTMENTS

As the winter season began to approach, the curtailment of outdoor related activities caused a normal seasonal retrenchment in selected industries such as agriculture, food processing, construction, and amusements. However, the seasonal losses experienced in these industries were downplayed by upswings in other industries such as wholesale/retail trade and government. The net result of November's labor market activity was the addition of an estimated 7,500 jobs to the statewide industrial payrolls.

On the goods-producing side of the economy, manufacturing employment increased by an estimated 300 jobs during November. However, within the industry, performance was mixed. On the up side, job gains of 200+ occurred in both printing and publishing and in nonelectrical machinery. These and other sporadic increases helped to compensate for the continuing seasonal decline in food processing and for employment downswings in fabricated metals and in transportation equipment.

Meanwhile, in construction, the normal drop-off in building and repair activity caused employment to recede by 1,600 jobs. The loss, however, was quite lower than normal for the month. Last November, the decline in construction employment was considerably higher at 3,300 jobs.

Sizeable seasonal swings were noted in several of the state's service-oriented industries over the month. In anticipation of the holiday season, employment at trade establishments jumped by 5,700 jobs. The increase was even greater, by 700 jobs, than the expansion which occurred during November 1987 despite concern that retailers were expecting holiday buying to be off this year. Increased hiring activity in general merchandise and apparel/accessory stores, when combined, accounted for slightly more than 70.0 percent of the overall increase in the trade sector. While the overall trend was up, building material and hardware stores, furniture stores, and restaurants reported lower employment totals in November.

During November, the services industries employed 400 fewer workers, with payroll reductions reported in hotels, amusements, business, and agricultural services. Limiting the losses in the sector, however, were gains in health, social, and educational services at private colleges and universities. In the transportation/communication/utilities sector, payrolls rose by 300 jobs over the month, with gains in utility services providing the primary impetus for this monthly gain.

The employment news was favorable in the finance/insurance/real estate sector during November. Overall industry growth translated into an estimated 500 additional jobs, with increases of 100+ jobs reported in credit agencies and among insurance carriers. Lastly, in government, an across the board increase raised public sector payrolls by an estimated 2,700 jobs over the month. Although non-educational related hiring activity did occur over the month, payrolls in educational facilities were the main target for expansion.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY
BY PLACE OF EMPLOYMENT
(in thousands)

NOVEMBER 1988

Major Industry Grouping	November 1988	October 1988	November 1987
Total Nonagricultural Employment	2,079.9	2,072.4	2,045.9
Manufacturing	207.3	207.0	207.1
Durable Goods	108.7	108.7	109.5
Nondurable Goods	98.6	98.3	97.6
Nonmanufacturing	1,872.6	1,865.4	1,838.8
Mining	1.9	1.9	1.9
Construction	156.4	158.0	153.7
Transportation & Public Utilities	95.3	95.0	94.0
Wholesale & Retail Trade	532.6	526.9	527.7
Wholesale Trade	111.1	110.8	111.1
Retail Trade	421.5	416.1	416.6
Finance, Insurance & Real Estate	128.6	128.1	125.7
Services	552.5	552.9	542.1
Total Government	405.3	402.6	393.7
Federal	128.0	127.6	128.9
State	93.9	93.3	91.7
Local	183.4	181.7	173.2

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request.
Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Regionally, unemployment in the Baltimore Metropolitan Area experienced a slightly larger drop than that statewide, falling from 5.2 percent to 4.7 percent. Last year, the BMA's unemployment rate, although lower at 4.3 percent, rose slightly during November. All of the BMA's local jurisdictions, with the exception of Carroll County where joblessness rose marginally from 2.8 percent to 2.9 percent, shared in November's unemployment decline. The BMA's industrial payrolls reacted similarly to those statewide, with the exception of the construction and services industries. While these sectors declined statewide, they showed a collective increase of an estimated 1,000 jobs in the BMA during November. Employment gains in trade, however, particularly in department and apparel stores, dominated the region's November job forecast.

MARYLAND'S D.C. SUBURBS

In Maryland's D.C. suburbs, a net labor force increase of 577 persons during November was offset by a substantially higher employment gain of 1,600 persons. The end result was the removal of slightly more than 1,000 persons from the regional unemployment rolls and a reduction in the area's jobless estimate from 3.4 percent in October to 3.3 percent in November. The largest decline occurred in Calvert County where joblessness dropped by 0.4 percentage points to register 4.0 percent in November. Within the region, industrial payrolls were boosted primarily by continuing recall activity at educational facilities and pre-holiday hiring, particularly in retail trade establishments.

WESTERN MARYLAND

The monthly job scenario was quite different in Western Maryland where job losses in construction, manufacturing, and services dampened the overall employment outlook and contributed to an increase, from 6.9 percent to 7.2 percent, in the region's jobless rate. Despite this increase, the region's jobless rate is still considerably lower than that of 7.8 percent recorded last November. Locally, unemployment increased in all the western counties, however, the most noteworthy movement occurred in Garrett County where the impact of employment declines was compounded further by a monthly rise in the county's labor force. The end result was an increase in the county's unemployment rate from 8.2 percent in October to 9.9 percent in November.

BALANCE OF STATE

November's labor market activity in the Balance of State also showed signs of increasing joblessness. During November, overall unemployment in the region rose to 6.2 percent, up from 5.9 percent in October. Unemployment escalated in all of the shore counties, with the exception of Talbot, Caroline, and Wicomico. Somerset and Worcester, the two eastern counties most affected by seasonal employment related to agriculture, tourism, and other outdoor activities, experienced the largest increases in jobless rates. Worcester County's jobless rate was the highest in the region, topping the 10.0 percent mark.

NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--NOVEMBER 1988

Major Industry Grouping	Baltimore Metropolitan Area		Maryland Portion D.C. Suburbs		Western Maryland		Balance of State	
	Nov. 1988	Oct.1988	Nov. 1988	Oct.1988	Nov. 1988	Oct.1988	Nov. 1988	Oct.1988
Total Nonagricultural Employment	1107.3	1101.2	741.5	737.3	86.1	86.5	137.4	137.3
Manufacturing	130.6	130.8	35.7	35.9	16.0	16.2	24.2	24.2
Durable Goods	72.6	72.8	18.3	18.5	7.3	7.4	8.9	8.8
Nondurable Goods	58.0	58.0	17.4	17.4	8.7	8.8	15.3	15.4
Nonmanufacturing	976.7	970.4	705.8	701.4	70.1	70.3	113.2	113.1
Construction	76.3	76.0	64.2	64.4	5.9	6.0	10.1	10.1
Transportation & Public Utilities	53.2	53.3	28.4	28.3	5.3	5.3	7.3	7.4
Wholesale and Retail Trade	274.2	271.1	199.1	195.9	23.6	23.6	37.4	37.3
Wholesale Trade	65.5	64.9	35.5	35.3	-	-	-	-
Retail Trade	208.7	206.2	163.6	160.6	-	-	-	-
Finance, Insurance & Real Estate	75.9	75.4	43.3	43.1	3.1	3.1	5.1	5.2
Services and Mining	291.5	290.8	213.0	213.3	18.6	18.7	29.3	29.3
Total Government	205.6	203.8	157.8	156.4	13.6	13.6	24.0	23.8
Federal	49.5	49.3	67.8	67.6	1.7	1.7	6.3	6.1
State	63.2	62.9	20.0	19.8	4.6	4.6	4.9	4.9
Local	92.9	91.6	70.0	69.0	7.3	7.3	12.8	12.8

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request.
Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

NOVEMBER, 1988

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOVEMBER	OCTOBER*	NOV.'87
MARYLAND	2,478,642	2,482,462	2,370,284	2,367,404	108,358	115,058	4.4	4.6	4.0
BALTIMORE METROPOLITAN AREA	1,185,193	1,190,028	1,129,890	1,128,015	55,303	62,013	4.7	5.2	4.3
BALTIMORE CITY	347,513	350,519	323,191	322,655	24,322	27,864	7.0	7.9	6.7
ANNE ARUNDEL	210,872	211,317	204,223	203,884	6,649	7,433	3.2	3.5	2.9
BALTIMORE	385,583	386,731	369,256	368,643	16,327	18,088	4.2	4.7	3.8
CARROLL	59,694	59,516	57,943	57,847	1,751	1,669	2.9	2.8	2.9
HARFORD	78,482	78,672	75,081	74,957	3,401	3,715	4.3	4.7	3.9
HOWARD	88,239	88,471	85,812	85,670	2,427	2,801	2.8	3.2	2.2
QUEEN ANNE'S	14,809	14,902	14,393	14,359	426	443	2.9	3.0	2.6
D. C. AREA	984,740	984,163	951,904	950,297	32,836	33,866	3.3	3.4	2.9
CALVERT	21,947	21,994	21,061	21,026	886	968	4.0	4.4	3.9
CHARLES	46,060	46,030	44,607	44,532	1,453	1,498	3.2	3.3	3.0
FREDERICK	74,391	74,256	72,212	72,091	2,179	2,165	2.9	2.9	2.7
MONTGOMERY	417,842	417,648	406,401	405,715	11,441	11,933	2.7	2.9	2.3
PRINCE GEORGE'S	424,498	424,236	407,622	406,933	16,876	17,303	4.0	4.1	3.3
WESTERN MARYLAND	101,383	101,529	94,065	94,509	7,318	7,020	7.2	6.9	7.8
ALLEGANY	32,497	32,441	29,711	29,674	2,786	2,767	8.6	8.5	10.1
GARRETT	12,572	12,478	11,333	11,457	1,239	1,021	9.9	8.2	7.8
WASHINGTON	56,314	56,610	53,021	53,378	3,293	3,232	5.8	5.7	6.4
BALANCE OF STATE	207,324	206,744	194,423	194,584	12,901	12,160	6.2	5.9	5.5
CAROLINE	14,415	14,335	13,699	13,591	716	744	5.0	5.2	4.1
CECIL	34,847	34,658	32,529	32,528	2,318	2,130	6.7	6.1	5.4
DORCHESTER	17,982	17,664	16,681	16,565	1,301	1,099	7.2	6.2	6.3
KENT	9,711	9,675	9,291	9,291	420	384	4.3	4.0	4.5
ST. MARY'S	38,130	38,579	36,024	35,649	2,106	1,930	5.5	5.1	4.2
SOMERSET	11,772	11,714	10,604	10,764	1,168	950	9.9	8.1	10.2
TALBOT	17,461	17,362	16,969	16,620	492	742	2.8	4.3	3.0
WICOMICO	42,920	42,570	40,574	40,028	2,346	2,542	5.5	6.0	5.1
WORCESTER	20,086	21,187	18,052	19,548	2,034	1,639	10.1	7.7	9.3
UNITED STATES [1]	122,639,000	122,432,000	116,314,000	116,250,000	6,325,000	6,182,000	5.2	5.0	5.6

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

December, 1988

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer
Governor

J. Randall Evans
Secretary

LABOR MARKET DIMENSIONS
DECEMBER, 1988

MARYLAND

UNEMPLOYMENT ADVANCES MARGINALLY

Seasonal trends dominated Maryland's labor market during December. Jobseekers, encouraged by the additional employment prospects normally generated during the holiday season, boosted the statewide labor force to a level of 2,480,967 in December, up from 2,478,362 in November. Meanwhile, the additional hiring activity in select job sectors which may very well have been expected to add workers to the statewide employment rolls was obscured by the seasonal job losses resulting from the curtailment of outdoor-related activities and from temporary layoffs prompted by holiday shutdowns. The net result was an employment decline of 4,071 persons. In response to this employment loss, unemployment rose from 108,481 and 4.4 percent of the labor force in November to 115,157 and 4.6 percent in December.

The upturn in the jobless rate, although normal for this time of year, positions this December's estimate moderately above that of 4.2 percent recorded last year. Although unemployment has increased since last December, continued growth in the statewide economy has generated jobs for more than 45,000 residents over the past year.

	December 1988	November 1988	December 1987
Civilian Labor Force	2,480,967	2,478,362	2,423,039
Total Employment	2,365,810	2,369,881	2,320,585
Total Unemployment	115,157	108,481	102,454
Unemployment Rate	4.6	4.4	4.2
National Civilian Unemployment Rate	5.0	5.2	5.4

During December, unemployment among workers across the nation dropped back by 0.2 percentage points to register 5.0 percent--a decline which was triggered by the withdrawal of an estimated 336,000 persons from the labor force.

PAYROLLS UP DESPITE SEASONAL FLUCTUATIONS

Nonagricultural wage and salary employment, estimated at 2,090,300 in December, exceeded November's job count by 11,000 jobs. The current estimate shows that businesses throughout the state have added close to 40,000 jobs since last December. Although overall employment increased over the past month, individual industry payrolls responded to normal seasonal fluctuations.

During December, seasonal hiring for the holiday season was, in large part, responsible for bolstering employment at trade establishments by 8,300 jobs. Nearly two-thirds of the overall trade increase, or 4,200 jobs, resulted from increased hiring activity at general merchandise and apparel stores. All the holiday buying, however, was not confined solely to these two sectors. Additional hiring, of note, was also reported at food stores, furniture retailers, and local eateries.

The outlook in the services sector was also favorable during December. The addition of 2,700 jobs over the month was reflected in payroll gains at firms supplying business services, health services, and varied personal services. While these industries supplemented their work forces, seasonal downswings lowered employment at hotels and in amusement and agricultural services.

Gains, of 300 jobs, were recorded in the finance, insurance, and real estate sector during December. Within the industry, hiring activity was concentrated primarily in credit agencies and among insurance carriers. Meanwhile, in the transportation industry, increased activity in trucking and warehousing was more than sufficient to offset slight declines in water transportation and in communications.

Employment in the building trades dropped back by 400 jobs over the month. Last year's seasonal decline was slightly higher at 600 jobs. This December's losses were shared evenly by heavy construction and special trade contractors.

Manufacturing payrolls also dipped in December, but by just 200 jobs. Temporary layoffs and vacation shutdowns lowered employment levels in electrical equipment, transportation equipment, and apparel manufacturing. On the up side, increased business activity translated into job gains in both fabricated metal and rubber and plastics manufacturing.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY
BY PLACE OF EMPLOYMENT
(in thousands)

DECEMBER 1988

Major Industry Grouping	December 1988	November 1988	December 1987
Total Nonagricultural Employment	2,090.3	2,079.3	2,050.8
Manufacturing	207.2	207.4	207.3
Durable Goods	108.5	108.7	109.5
Nondurable Goods	98.7	98.7	97.8
Nonmanufacturing	1,883.1	1,871.9	1,843.5
Mining	1.8	1.9	1.9
Construction	156.4	156.8	153.1
Transportation & Public Utilities	95.6	94.9	94.3
Wholesale & Retail Trade	540.7	532.4	531.9
Wholesale Trade	111.4	111.3	111.4
Retail Trade	429.3	421.1	420.5
Finance, Insurance & Real Estate	128.7	128.4	126.1
Services	554.9	552.2	542.0
Total Government	405.0	405.3	394.3
Federal	128.4	128.3	129.2
State	93.6	93.8	91.5
Local	183.0	183.2	173.6

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request.
Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

In the Baltimore Metropolitan Area, an influx of nearly 8,000 jobseekers into the area's labor market was the underlying factor responsible for raising the BMA's jobless rate from 4.7 percent to 5.3 percent. While the bulk of the region's labor force expansion was reflected on the jobless rolls, employment also rose modestly over the month, by an estimated 686 persons. Increased joblessness was prevalent throughout the area, however, the impact fell more heavily upon Baltimore City residents. Baltimore City absorbed nearly 50.0 percent of the BMA's overall increase, adding an estimated 3,510 persons to its jobless rolls and pushing its unemployment rate up to 7.9 percent. Elsewhere in the BMA, jobless rates ranged from a low of 3.2 percent in Howard County to 5.0 percent in Harford County.

MARYLAND'S D.C. SUBURBS

The economic scenario in the D.C. suburbs was inconsistent with the statewide forecast during December. Although employment declined in the D.C. suburbs, the potential impact of this decline was overshadowed by a corresponding drop in the regional labor force which actually helped to ease the area's unemployment rate down from 3.3 percent in November to 3.2 percent in December. Within the area, jobless rates declined in all local jurisdictions with the exception of Frederick County where unemployment rose negligibly from 2.9 percent to 3.0 percent. Throughout the region, normal seasonal declines tapered payrolls in construction and agricultural services, however, hiring activity did occur in trucking, general merchandise/apparel stores, eating and drinking places, and business services.

WESTERN MARYLAND

An increase of 0.3 percentage points over the month raised Western Maryland's unemployment rate to 7.5 percent in December. Despite this increase, this December's jobless rate is the lowest unemployment rate on record for the month since the tracking of regional estimates began in 1980. Last December, the area's estimate stood at a much higher 8.0 percent. Locally, in Allegany County, the withdrawal of workers from the job market actually caused unemployment to decline from 8.6 percent to 8.4 percent. In both Garrett and Washington counties, however, unemployment rose to 10.0 percent and 6.4 percent, respectively. The largest increase occurred in Washington County--an increase which took place despite a gain of 474 in the number of workers recorded between November and December.

BALANCE OF STATE

December's labor market activity in the Balance of State area also showed signs of increasing joblessness. The net result of December's scenario was the addition of 700 persons to the area's jobless rolls--an increase which resulted directly from employment declines. Overall joblessness in the region rose to 6.7 percent in December, up from 6.2 percent in November. Unemployment rates escalated in all of the area's local jurisdictions, with the exception of Caroline, Dorchester, and St. Mary's. In Talbot County, the jobless rate doubled, going from 2.8 percent to 5.6 percent, with temporary layoffs in manufacturing contributing to this rise.

NONAGRICULTURAL PAYROLL EMPLOYMENT[1] BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--DECEMBER 1988

Major Industry Grouping	Baltimore Metropolitan Area		Maryland Portion D.C. Suburbs		Western Maryland		Balance of State	
	Dec. 1988	Nov.1988	Dec. 1988	Nov.1988	Dec. 1988	Nov.1988	Dec. 1988	Nov.1988
Total Nonagricultural Employment	1116.1	1106.6	747.4	743.2	88.0	86.4	136.6	137.6
Manufacturing	131.0	130.3	36.1	36.1	16.3	16.0	23.9	24.2
Durable Goods	73.2	72.6	18.7	18.7	7.4	7.3	8.8	8.9
Nondurable Goods	57.8	57.7	17.4	17.4	8.9	8.7	15.1	15.3
Nonmanufacturing	985.1	976.3	711.3	707.1	71.7	70.4	112.7	113.4
Construction	75.6	76.4	63.5	64.5	5.9	5.8	10.1	10.1
Transportation & Public Utilities	53.6	53.3	28.8	28.8	5.2	5.3	7.3	7.3
Wholesale and Retail Trade	280.5	274.3	202.4	199.0	24.3	23.7	37.1	37.5
Wholesale Trade	65.8	65.2	35.6	35.4	-	-	-	-
Retail Trade	214.7	209.1	166.8	163.6	-	-	-	-
Finance, Insurance & Real Estate	76.1	75.5	43.3	43.3	3.1	3.1	5.2	5.2
Services and Mining	293.4	291.3	214.8	213.1	19.0	18.7	29.2	29.3
Total Government	205.9	205.5	158.5	158.4	14.2	13.8	23.8	24.0
Federal	50.4	49.5	68.4	68.2	1.8	1.7	6.2	6.2
State	63.7	63.3	19.9	20.0	4.7	4.8	4.8	4.9
Local	91.8	92.7	70.2	70.2	7.7	7.3	12.8	12.9

[1]The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request.
Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

DECEMBER, 1988

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	DECEMBER	NOVEMBER*	DECEMBER	NOVEMBER*	DECEMBER	NOVEMBER*	DECEMBER	NOVEMBER*	DEC. '87
MARYLAND	2,480,967	2,478,362	2,365,810	2,369,881	115,157	108,481	4.6	4.4	4.2
BALTIMORE METROPOLITAN AREA	1,191,934	1,183,949	1,129,230	1,128,544	62,704	55,405	5.3	4.7	4.8
BALTIMORE CITY	350,896	347,190	323,002	322,806	27,894	24,384	7.9	7.0	7.6
ANNE ARUNDEL	211,406	210,655	204,104	203,980	7,302	6,675	3.5	3.2	3.3
BALTIMORE	387,318	385,179	369,040	368,816	18,278	16,363	4.7	4.2	4.1
CARROLL	59,878	59,618	57,909	57,874	1,969	1,744	3.3	2.9	3.3
HARFORD	78,959	78,385	75,037	74,992	3,922	3,393	5.0	4.3	4.3
HOWARD	88,554	88,132	85,762	85,710	2,792	2,422	3.2	2.7	2.3
QUEEN ANNE'S	14,921	14,790	14,375	14,366	546	424	3.7	2.9	3.4
D. C. AREA	982,509	985,297	951,290	952,441	31,219	32,856	3.2	3.3	2.8
CALVERT	21,916	21,971	21,047	21,073	869	898	4.0	4.1	4.0
CHARLES	45,865	46,100	44,579	44,633	1,286	1,467	2.8	3.2	3.0
FREDERICK	74,411	74,415	72,166	72,253	2,245	2,162	3.0	2.9	2.9
MONTGOMERY	417,078	418,082	406,139	406,631	10,939	11,451	2.6	2.7	2.2
PRINCE GEORGE'S	423,240	424,731	407,359	407,852	15,881	16,879	3.8	4.0	3.2
WESTERN MARYLAND	102,404	101,640	94,762	94,312	7,642	7,328	7.5	7.2	8.0
ALLEGANY	32,443	32,571	29,705	29,782	2,738	2,789	8.4	8.6	10.1
GARRETT	12,686	12,603	11,419	11,366	1,267	1,237	10.0	9.8	10.0
WASHINGTON	57,275	56,466	53,638	53,164	3,637	3,302	6.4	5.8	6.4
BALANCE OF STATE	204,121	207,474	190,529	194,582	13,592	12,892	6.7	6.2	5.8
CAROLINE	14,113	14,434	13,428	13,717	685	717	4.9	5.0	5.6
CECIL	34,743	34,916	32,414	32,613	2,329	2,303	6.7	6.6	4.9
DORCHESTER	17,196	18,001	15,992	16,699	1,204	1,302	7.0	7.2	6.0
KENT	9,285	9,719	8,748	9,301	537	418	5.8	4.3	5.1
ST. MARY'S	37,445	38,068	35,772	35,965	1,673	2,103	4.5	5.5	4.3
SOMERSET	11,352	11,784	10,089	10,619	1,263	1,165	11.1	9.9	10.0
TALBOT	17,418	17,475	16,451	16,983	967	492	5.6	2.8	4.1
WICOMICO	43,223	42,987	40,642	40,621	2,581	2,366	6.0	5.5	5.4
WORCESTER	19,346	20,090	16,993	18,064	2,353	2,026	12.2	10.1	11.0
UNITED STATES[1]	122,120,000	122,639,000	115,978,000	116,314,000	6,142,000	6,325,000	5.0	5.2	5.4

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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Maryland
Department of Economic &
Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

January and February, 1989

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
JANUARY AND FEBRUARY, 1989

MARYLAND

JANUARY-FEBRUARY LABOR FORCE TRENDS REVERSED

Labor market activity during the winter months customarily reflects a degree of seasonality. In this respect, the new year began as usual. Unemployment escalated in January as was the norm, however, the increase was much less than seasonally expected and the underlying circumstances responsible for the unemployment upswing, specifically the movement of the individual labor force components, was also quite atypical when likened to previous years.

Average, since 1982, the variation in the statewide jobless rate between December and January has hovered at 0.5 percentage points. This year, the increase in the monthly unemployment rate was limited to just 0.2 percentage points, positioning January's estimate at 4.0 percent. Even with this increase, this January's jobless rate was well below that of 5.0 percent reported last year. It was also the lowest jobless rate on record for the month since that of 3.3 percent in 1970.

January's labor market trends have always been relatively predictable. Normally, in January, the layoffs which result from the termination of temporary holiday sales staff and from the general slowdown in outdoor-related activities cause employment to drop back. Many of these workers have always opted to exit the job market during this down time, thereby reducing the number of persons active in the labor force. This January's estimates, however, presented a contrasting picture. Between December and January, more than 15,300 persons entered the job market, moving the labor force up to a level of 2,457,728. Although employment also climbed, to a near record-breaking level of 2,387,064, January's employment gain was only sufficiently strong enough to absorb 53.0 percent of the overall expansion in the labor force. As a result, the number of unemployed rose by slightly more than 7,200 persons over the month. From an historical standpoint, this increase, however, was moderate when compared to the average rise in unemployment, of an estimated 10,425 persons, over the past six years (1982-1988).

The retrenchment in the labor force and employment levels which was expected in January appears only to have been delayed until February. Maryland's labor force, after rising in January, tightened significantly in February. The seasonal movement of workers out of the job market caused the number of participants in the work force to decline by 10,642. Meanwhile, seasonal layoffs pulled the number of working Marylanders down by 12,849. The net result of February's labor market activity was an increase of slightly more than 2,200 persons in the state's pool of unemployed workers, causing the jobless rate to rise from January's level of 4.0 percent to an estimated 4.2 percent in February.

	February 1989	January 1989	December 1988
Civilian Labor Force	2,477,086	2,487,728	2,472,409
Total Employment	2,374,215	2,387,064	2,378,983
Total Unemployment	102,871	100,664	93,426
Unemployment Rate	4.2	4.0	3.8
National Civilian Unemployment Rate	5.6	6.0	5.0

SEASONAL SWINGS DOMINATE PAYROLL ACTIVITY

In typical fashion, seasonal employment declines were scattered throughout Maryland's industrial payrolls during January, lowering job counts in both the private and public sectors. The statewide survey of business establishments during January showed that employers rolled back their payrolls by an estimated 61,300 jobs. This loss, however, was slightly less than seasonally expected. Last January's decline was higher by an estimated 3,600 jobs.

Following January's decline, business payrolls headed back up in February with the addition of an estimated 6,500 jobs. The upswing in industrial activity during February, however, resulted primarily from recall activity rather than from actual new job generation. While the overall trend was up for February, seasonal losses continued to taper payrolls in a number of selected industry sectors.

Manufacturing, although declining in January, resisted normal seasonal patterns somewhat in that this year's losses were considerably lower than those shown in previous years. Employment in manufacturing receded by 2,400 jobs this January compared to an average monthly drop of 3,200 jobs over the past five years. Approximately 75.0 percent of January's manufacturing losses resulted from reduced production activity in the nondurable goods component. Seasonal cutbacks in food processing caused jobs to drop back by 1,100 over the month. Elsewhere in manufacturing, declines were limited to 100-200 jobs. During February, manufacturing as a whole showed no change, with the total job count holding at 207,700. Individual industry performance was mixed; however, the only real standout during February was electric/electronic equipment manufacturing which was up by 400 jobs.

Construction activity took its normal seasonal dip in January, falling by an estimated 11,300 jobs. The downswing extended into February, with the loss of an additional 2,000 jobs. Job declines in general building and heavy construction contracting were almost evenly matched over the two month period. Special trade contractors posted the largest declines, absorbing nearly 45 percent of the overall industry loss through February. This is not surprising since home improvement activity normally slackens off after the holidays and the demand for specialized crafts people also diminishes due to the general slowdown in building activity. Although construction employment is expected to rise in March, the recent upturn in interest rates could very well hold down the overall pace of building activity in months to come.

Jobs in transportation/communication/utilities, which numbered 97,600 in December, declined steadily through the beginning of the year to a level of 94,700 in February. Compared to last February, however, employment in this industry group was up by an estimated 2,200 jobs. Job declines, for the most part, were confined to the transportation sector. Although local transportation dipped somewhat in January, employment declines in trucking and warehousing were largely responsible for the downward movement in the industry's payrolls.

The number of jobs in the trade sector contracted by 25,700 between December and February. Job declines were heaviest in January as employers began to lower their payrolls by eliminating temporary holiday sales positions. Most of the drop in trade was in general merchandise and apparel stores, however, the end of the holiday season also caused employment cuts in restaurants, food stores, and gasoline stations. The general slowdown in construction activity diminished the demand for building supplies, prompting retailers to reduce their payrolls.

Business activity in the finance/insurance/real estate industry also toned down in the beginning of the year, causing jobs in this sector to dwindle by approximately 1,000 between December and February. This year's decline, however, was identical to that of last year. In real estate, where transactions always tend to fall off during the winter months, employment dropped back by an estimated 500 jobs through February. The downturn in real estate activity, combined with the slackening in construction, contributed to losses of an estimated 200 jobs in the banking industry during the initial months of the year. Insurance carriers, the only segment to reflect any increased activity, supplemented their payrolls by 100 jobs.

Seasonal losses in a number of services industries pulled down employment in this sector by 9,700 jobs between December and January. Semester breaks at private colleges and universities caused employment in educational services to drop back noticeably. With holiday functions over, job reductions also occurred in hotels and amusements. Employment in agricultural and business services was also lower as usual. Some of the losses which diminished employment in January were recouped in February. Recall activity at educational facilities contributed an estimated 2,300 jobs to February's overall employment gain of 4,700. Companies throughout the state tallied their inventories and closed out their books for the previous year, increasing the demand in a variety of business service establishments. Jobs in personal services also rose, an indication that firms were gearing up for the tax season.

Employment trends in the public sector through February, were, for the most part, dominated by the semester break activity at educational facilities. During January, more than 10,000 jobs were lost in state and local government, 96 percent of which were tied to education. However, this loss was, as expected, only temporary. As schools reopened their doors in February to begin the spring semester, initial recall activity signaled gains in both state and local governments.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
FEBRUARY 1989

Major Industry Group	February 1989	January 1989	December 1988
Total Nonagricultural Employment	2084.6	2078.1	2139.4
Manufacturing	207.7	207.7	210.1
Durable Goods	111.2	111.0	111.6
Nondurable Goods	96.5	96.7	98.5
Nonmanufacturing	1876.9	1870.4	1929.3
Mining	1.6	1.7	1.7
Construction	150.7	152.7	164.0
Transportation, Communication, and Public Utilities	94.7	95.2	97.6
Wholesale and Retail Trade	525.1	528.2	550.8
Wholesale Trade	111.6	110.9	111.8
Retail Trade	413.5	417.3	439.0
Finance, Insurance, and Real Estate	130.3	130.4	131.3
Services	564.5	559.8	569.5
Total Government	410.0	402.4	414.4
Federal	132.1	131.7	133.5
State	94.7	92.8	95.4
Local	183.2	177.9	185.5

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Although the seasonal labor force and employment declines which are typical of January appeared to have been delayed statewide, they were right on schedule in the Baltimore Metropolitan Area. While timely, the declines were significantly lower than the norm. Through January, residential employment in the BMA dropped back by 1,179 people. While nearly a third of these people chose to abandon their work search and withdraw from the labor force, slightly more than 800 workers were added to the area's unemployment rolls. With this increase, the region's jobless rate inched up slightly from 4.3 percent in December to 4.4 percent in January. Seasonal layoffs continued to pare the BMA's employment level into February. Between January and February, an additional 7,300 persons were cut from the area's employment rolls, 1,649 of whom found themselves counted among the jobless. Reflecting these movements, the BMA's unemployment rate moved up another notch in February, rising to 4.5 percent. Last February, the region's jobless estimate stood at a much higher 5.3 percent. Unemployment rose in all of the region's local jurisdictions through February, with the exception of Howard County where the jobless rate dropped back from 2.5 percent in December to 2.0 percent in both January and February.

MARYLAND'S D.C. SUBURBS

During the reference months (January and February), labor force patterns in Maryland's D.C. suburbs were closely aligned with those statewide. Between December and January, the statewide labor force rose by over 15,300 persons. Nearly two-thirds of this expansion was centered in the D.C. suburban area. Although employment in the region also rose to a record-breaking level of 962,101, the increasing job demands created by the area's expanding labor force undermined the monthly employment gains and caused unemployment to inch up slightly from 2.6 percent in December to 2.7 percent in January. The D.C. area's labor force began to settle back in February. Employment in the region, which had steadily risen since the latter quarter of 1988, started to reflect the reductions typical of the post-holiday period. During February, the number of employed persons residing in the area dropped back by slightly more than 3,700. All of the local jurisdictions comprising the region shared in this decline. For the area as a whole, joblessness inched up to 2.9 percent in February. With the exception of Montgomery County where unemployment held steady at 2.2 percent, jobless rates rose slightly in each locality. Despite these increases, jobless rates throughout the region were noticeably lower than comparable figures in 1988.

WESTERN MARYLAND

At 8.0 percent, Western Maryland had the highest unemployment rate of the state's four regions during January. In addition to being the highest, the western region's rate also showed the largest increase, of two full percentage points, over the month. Despite this increase, January's jobless rate was the lowest unemployment rate on record for the month since the recording of regional estimates began in 1980. Although employment in the region did rise through January, by an estimated 1,074 persons, a substantially higher increase, of 3,372 persons, in the total labor force was the primary factor responsible for the regional unemployment rise. About 75.0 percent of the monthly regional labor force expansion occurred in Washington County, causing joblessness to escalate from 5.1 percent in December to 7.2 percent in January. In February, the western region's labor market turned around completely. Employment dropped back by 726 persons through February, however, the potential impact of this employment decline was deterred by the withdrawal of slightly more than 1,200 workers from the job market. With labor force declines outpacing employment reductions, February's unemployment rate stepped back, dropping down to 7.6 percent. Washington County, however, was the only jurisdiction within the region to benefit from this reduction.

BALANCE OF STATE

Labor market activity in the Balance of State area during January followed along the same track as that in the D.C. suburban area and Western Maryland. Between December and January, the addition of 2,364 persons to the area's jobless rolls was fueled by a slight decline in employment and compounded further by a sizeable increase in the number of new and re-entrant jobseekers into the labor market. Overall joblessness in the region rose from 5.4 percent in December to 6.6 percent in January. In Talbot, the only county to experience a reduction in joblessness over the month, unemployment dropped by 0.6 percentage points to a low 3.9 percent in January. Following January's rise, unemployment in the area dropped back slightly to 6.5 percent in February. Last February, joblessness in the region was much higher at 7.6 percent. During February, seasonal layoffs diminished the region's employment rolls by slightly more than 1,100 workers. However, the withdrawal of these and other workers from the job market helped to ease the area's unemployment volume by 125 persons through February. Locally, unemployment responded to normal seasonal occurrences. Jobless rates in the region during February ran from a low of 4.0 percent in Talbot to a high of 12.9 percent in Somerset.

BALTIMORE METROPOLITAN AREA
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
FEBRUARY 1989

Major Industry Group	February 1989	January 1989	December 1988
Total Nonagricultural Employment	1107.8	1102.8	1141.6
Manufacturing	132.0	131.5	132.5
Durable Goods	75.7	75.0	75.2
Nondurable Goods	56.3	56.5	57.3
Nonmanufacturing	975.8	971.3	1009.1
Mining	0.3	0.3	0.3
Construction	70.4	70.5	77.9
Transportation, Communication, and Public Utilities	54.3	54.7	55.2
Wholesale and Retail Trade	269.5	270.3	285.3
Wholesale Trade	66.2	65.8	67.7
Retail Trade	203.3	204.5	217.6
Finance, Insurance, and Real Estate	77.4	77.2	77.9
Services	295.3	291.8	300.1
Total Government	208.6	206.5	212.4
Federal	51.8	52.5	53.6
State	65.1	64.6	65.4
Local	91.7	89.4	93.4

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND PORTION D.C. SUBURBS
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
FEBRUARY 1989

Major Industry Group	February 1989	January 1989	December 1988
Total Nonagricultural Employment	753.1	749.0	769.3
Manufacturing	35.9	36.1	36.2
Durable Goods	17.9	18.2	18.3
Nondurable Goods	18.0	17.9	17.9
Nonmanufacturing	717.2	712.9	733.1
Mining	0.4	0.4	0.5
Construction	63.7	64.3	67.9
Transportation, Communication, and Public Utilities	28.3	28.2	30.0
Wholesale and Retail Trade	200.0	201.9	208.3
Wholesale Trade	36.1	35.5	36.3
Retail Trade	163.9	166.4	172.0
Finance, Insurance, and Real Estate	43.9	43.9	44.1
Services	218.0	216.9	219.7
Total Government	162.9	157.3	162.6
Federal	71.2	70.8	71.5
State	20.1	19.1	20.3
Local	71.6	67.4	70.8

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

WESTERN MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
FEBRUARY 1989

Major Industry Group	February 1989	January 1989	December 1988
Total Nonagricultural Employment	89.6	89.1	91.2
Manufacturing	15.9	15.6	15.8
Durable Goods	7.6	7.4	7.4
Nondurable Goods	8.3	8.2	8.4
Nonmanufacturing	73.7	73.5	75.4
Mining	-	-	-
Construction	6.3	6.4	6.6
Transportation, Communication, and Public Utilities	5.0	5.0	5.0
Wholesale and Retail Trade	25.4	25.4	26.0
Wholesale Trade	-	-	-
Retail Trade	-	-	-
Finance, Insurance, and Real Estate	3.3	3.3	3.3
Services**	19.2	19.2	19.7
Total Government	14.5	14.2	14.8
Federal	1.9	2.0	2.0
State	4.5	4.5	4.5
Local	8.1	7.7	8.3

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

**Includes mining.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

BALANCE OF STATE
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
FEBRUARY 1989

Major Industry Group	February 1989	January 1989	December 1988
Total Nonagricultural Employment	133.7	132.8	137.3
Manufacturing	23.7	24.0	24.3
Durable Goods	9.7	9.7	9.9
Nondurable Goods	14.0	14.3	14.4
Nonmanufacturing	110.0	108.8	113.0
Mining	-	-	-
Construction	9.9	9.9	10.9
Transportation, Communication, and Public Utilities	7.5	7.5	7.6
Wholesale and Retail Trade	33.5	33.6	34.7
Wholesale Trade	-	-	-
Retail Trade	-	-	-
Finance, Insurance, and Real Estate	4.7	4.7	4.8
Services**	29.8	29.6	30.2
Total Government	24.6	23.5	24.8
Federal	6.7	6.6	6.6
State	4.8	4.2	5.1
Local	13.1	12.7	13.1

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

**Includes mining.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

JANUARY, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JANUARY	DECEMBER*	JAN. '88
MARYLAND	2,488,065	2,472,409	2,387,312	2,378,983	100,753	93,426	4.0	3.8	5.0
BALTIMORE METROPOLITAN AREA	1,191,310	1,189,224	1,139,502	1,138,289	51,808	50,935	4.3	4.3	5.3
BALTIMORE CITY	342,121	341,695	319,378	319,038	22,743	22,657	6.6	6.6	8.2
ANNE ARUNDEL	213,135	212,724	207,010	206,790	6,125	5,934	2.9	2.8	3.5
BALTIMORE	385,746	386,095	371,644	371,248	14,102	14,847	3.7	3.8	4.4
CARROLL	62,520	61,627	60,092	60,028	2,428	1,599	3.9	2.6	5.3
HARFORD	81,384	80,514	77,409	77,327	3,975	3,187	4.9	4.0	6.2
HOWARD	90,813	91,123	88,950	88,855	1,863	2,268	2.1	2.5	2.2
QUEEN ANNE'S	15,591	15,447	15,019	15,003	572	444	3.7	2.9	5.6
D. C. AREA	987,188	979,064	960,043	953,746	27,145	25,318	2.7	2.6	3.4
CALVERT	23,033	22,676	22,116	21,971	917	705	4.0	3.1	5.6
CHARLES	47,395	46,951	46,213	45,910	1,182	1,041	2.5	2.2	3.4
FREDERICK	77,251	75,505	74,170	73,684	3,081	1,821	4.0	2.4	5.4
MONTGOMERY	422,174	419,097	412,934	410,225	9,240	8,872	2.2	2.1	2.6
PRINCE GEORGE'S	417,334	414,835	404,609	401,956	12,725	12,879	3.0	3.1	3.6
WESTERN MARYLAND	104,893	102,913	96,599	96,703	8,294	6,210	7.9	6.0	9.7
ALLEGANY	32,396	31,804	29,720	29,597	2,676	2,207	8.3	6.9	11.6
GARRETT	12,637	13,027	11,379	11,993	1,258	1,034	10.0	7.9	11.7
WASHINGTON	59,860	58,082	55,500	55,113	4,360	2,969	7.3	5.1	8.2
BALANCE OF STATE	204,676	201,208	191,170	190,245	13,506	10,963	6.6	5.4	8.1
CAROLINE	15,629	13,948	14,947	13,394	682	554	4.4	4.0	7.0
CECIL	35,345	34,257	32,745	32,381	2,600	1,876	7.4	5.5	9.2
DORCHESTER	17,309	16,995	15,964	16,021	1,345	974	7.8	5.7	9.0
KENT	9,000	9,123	8,462	8,692	538	431	6.0	4.7	8.3
ST. MARY'S	38,553	38,602	36,938	37,215	1,615	1,387	4.2	3.6	5.6
SOMERSET	11,027	11,219	9,730	10,201	1,297	1,018	11.8	9.1	14.1
TALBOT	17,044	17,170	16,320	16,391	724	779	4.2	4.5	4.7
WICOMICO	42,139	41,211	39,645	39,162	2,494	2,049	5.9	5.0	6.6
WORCESTER	18,630	18,683	16,419	16,788	2,211	1,895	11.9	10.1	13.5
[1] UNITED STATES	122,095,000	122,120,000	114,786,000	115,978,000	7,309,000	6,142,000	6.0	5.0	6.3

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are seasonally adjusted.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

ST[illegible]ARYLAND
CIVILIAN LABOR F[illegible], EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

FEBRUARY, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	FEBRUARY	JANUARY*	FEBRUARY	JANUARY*	FEBRUARY	JANUARY*	FEBRUARY	JANUARY*	FEB.'88
MARYLAND	2,477,086	2,487,728	2,374,215	2,387,064	102,871	100,664	4.2	4.0	4.9
BALTIMORE METROPOLITAN AREA	1,183,201	1,188,852	1,129,810	1,137,110	53,391	51,742	4.5	4.4	5.3
BALTIMORE CITY	339,875	341,468	316,662	318,708	23,213	22,760	6.8	6.7	8.1
ANNE ARUNDEL	211,647	212,703	205,250	206,576	6,397	6,127	3.0	2.9	3.6
BALTIMORE	383,372	384,934	368,483	370,863	14,889	14,071	3.9	3.7	4.5
CARROLL	62,040	62,380	59,581	59,966	2,459	2,414	4.0	3.9	5.0
HARFORD	80,765	81,199	76,751	77,247	4,014	3,952	5.0	4.9	6.1
HOWARD	89,995	90,612	88,193	88,763	1,802	1,849	2.0	2.0	2.2
QUEEN ANNE'S	15,507	15,556	14,891	14,987	616	569	4.0	3.7	5.4
D. C. AREA	986,637	989,188	958,390	962,101	28,247	27,087	2.9	2.7	3.2
CALVERT	23,085	23,095	22,078	22,164	1,007	931	4.4	4.0	5.2
CHARLES	47,417	47,500	46,134	46,312	1,283	1,188	2.7	2.5	3.3
FREDERICK	77,292	77,436	74,043	74,329	3,249	3,107	4.2	4.0	4.8
MONTGOMERY	421,657	423,028	412,223	413,819	9,434	9,209	2.2	2.2	2.5
PRINCE GEORGE'S	417,187	418,129	403,913	405,477	13,274	12,652	3.2	3.0	3.5
WESTERN MARYLAND	105,083	106,285	97,051	97,777	8,032	8,508	7.6	8.0	10.2
ALLEGANY	32,728	32,908	29,733	30,034	2,995	2,874	9.2	8.7	11.5
GARRETT	12,824	12,760	11,448	11,519	1,376	1,241	10.7	9.7	12.5
WASHINGTON	59,531	60,617	55,870	56,224	3,661	4,393	6.1	7.2	9.0
BALANCE OF STATE	202,168	203,403	188,966	190,076	13,202	13,327	6.5	6.6	7.6
CAROLINE	14,112	14,230	13,348	13,539	764	691	5.4	4.9	6.9
CECIL	34,911	35,343	32,552	32,842	2,359	2,501	6.8	7.1	8.0
DORCHESTER	17,428	17,337	15,850	15,989	1,578	1,348	9.1	7.8	9.3
KENT	9,034	8,987	8,396	8,474	638	513	7.1	5.7	7.6
ST. MARY'S	38,576	38,622	36,942	37,001	1,634	1,621	4.2	4.2	5.3
SOMERSET	11,173	11,049	9,729	9,749	1,444	1,300	12.9	11.8	14.4
TALBOT	16,954	17,007	16,278	16,344	676	663	4.0	3.9	4.7
WICOMICO	41,409	42,200	39,328	39,700	2,081	2,500	5.0	5.9	6.0
WORCESTER	18,571	18,628	16,543	16,438	2,028	2,190	10.9	11.8	12.9
[1] UNITED STATES	121,906,000	122,095,000	115,023,000	114,786,000	6,883,000	7,309,000	5.6	6.0	6.2

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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Maryland
Department of Economic & Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

March, 1989

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
MARCH, 1989

MARYLAND

UNEMPLOYMENT TAKES SEASONAL SLIDE

Following a series of seasonal layoffs in the winter months, Maryland's labor market began to rebound from its cold weather slump in March. As weather conditions moderated, local businesses throughout the state gradually began to ease back into a hiring posture. Both the labor force and employment levels hit new records for the month. As statewide employment headed back up, unemployment dropped back by 0.2 percentage points over the month. At 4.0 percent, March's rate was the lowest unemployment rate on record for the month in nearly two decades.

Jobseekers, encouraged by the onset of springtime hiring activity, boosted the statewide labor force to a level of 2,492,715 in March, up from 2,477,771. Meanwhile, the number of Marylanders holding jobs moved up by an estimated 17,621 persons. March's employment growth was strong enough to cover the increase of 14,944 in the labor force and, at the same time, to reduce the statewide unemployment rolls by nearly 2,700 persons.

	March 1989	February 1989	March 1988
Civilian Labor Force	2,492,715	2,477,771	2,439,338
Total Employment	2,392,432	2,374,811	2,329,508
Total Unemployment	100,283	102,960	109,830
Unemployment Rate	4.0	4.2	4.5
National Civilian Unemployment Rate	5.2	5.6	6.9

Since last March, the labor market experience of Maryland residents has improved noticeably. The resiliency of the statewide economy has drawn an additional 53,377 jobseekers into the labor force over the past year. More importantly, there are now nearly 63,000 more residents with jobs and 9,547 fewer persons counted among the unemployed. Compared with a year ago, the March unemployment rate was down from 4.5 percent.

The outlook for jobseeekers across the nation also improved somewhat during March. The nation's unemployment rate dropped back by 0.4 percentage points to register 5.2 percent in March. The increase in the number of workers nationwide was almost identical to that statewide during March. However, growth in the national labor force was proportionally much slower than in Maryland.

When ranking Maryland with the other states, Maryland had the ninth lowest jobless rate in the country during March. This was down one notch from the position held in February. Only one state in the mid-atlantic region, Delaware, recorded a jobless rate below that of Maryland during both February and March.

SPRINGTIME HIRING OFF TO A SLOW START

With spring hiring underway, Maryland's nonagricultural payroll employment increased by 8,100 jobs during March. This year's hiring activity, although on schedule, was off to a much slower start than in 1988 when hiring boosted the March job count by a much greater 29,000 jobs. Based on the job gains reported over the past few months, it appears that Maryland's job growth is being pinched by the same inflationary pressures that are dampening national job growth.

During March, construction slowly began to pull out of its winter slump with employment moving up by an estimated 1,900 jobs. Employment advanced in all facets of construction; however, special trade contractors were the primary growth contributor in this sector, accounting for well over 50.0 percent of the overall industry gain during March. As weather conditions continue to improve, prospects in construction should pick up. However, with mortgage rates currently holding at relatively high levels, future progress in homebuilding poses a major uncertainty for the industry.

The most significant gains over the month emanated from seasonal hiring activity in the services sector. Employment gains in this diverse industry group accounted for approximately one-third of the total statewide job increase during March. Within the industry, increased demand helped to elevate employment levels in agri-business, amusement, health, and personal services.

Elsewhere in the private sector, seasonal hiring was also noteworthy in local eateries and in trade establishments selling building materials, garden supplies, and hardware items.

Within the public sector, continuing recall activity at community colleges and local boards of education exerted the primary influence on government payrolls.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
MARCH 1989

Major Industry Group	March 1989	February 1989	March 1988
Total Nonagricultural Employment	2094.1	2086.0	2063.4
Manufacturing	206.7	206.5	207.9
Durable Goods	110.1	110.1	111.9
Nondurable Goods	96.6	96.4	96.0
Nonmanufacturing	1887.4	1879.5	1855.5
Mining	1.6	1.6	1.6
Construction	151.8	149.9	153.1
Transportation, Communication, and Public Utilities	95.7	95.5	94.0
Wholesale and Retail Trade	528.0	526.9	522.3
Wholesale Trade	112.8	112.1	111.8
Retail Trade	415.2	414.8	410.5
Finance, Insurance, and Real Estate	130.4	130.1	127.7
Services	566.5	563.8	554.2
Total Government	413.4	411.7	402.6
Federal	131.4	131.1	131.2
State	95.9	95.5	93.4
Local	186.1	185.1	178.0

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
MARCH 1989

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Mar.1989	Feb.1989	Mar.1989	Feb.1989	Mar.1989	Feb.1989
MARYLAND						
Manufacturing	41.3	41.2	$449.34	$444.14	$10.88	$10.78
Durable Goods	42.8	42.7	499.90	490.20	11.68	11.48
Lumber and Wood Products	37.1	37.7	309.79	318.19	8.35	8.44
Furniture and Fixtures	39.9	41.4	383.04	398.68	9.60	9.63
Stone, Clay & Glass Products	44.9	42.1	486.72	452.58	10.84	10.75
Primary Metal Industries	43.5	44.1	629.45	636.80	14.47	14.44
Fabricated Metals	39.5	41.0	378.02	389.91	9.57	9.51
Machinery, Exc. Electrical	43.7	43.9	540.13	530.75	12.36	12.09
Electronic and Electrical Equipment	43.5	43.8	430.22	428.36	9.89	9.78
Transportation Equipment	44.9	43.6	682.03	638.74	15.19	14.65
Instruments and Related	40.0	39.5	385.20	376.83	9.63	9.54
Miscellaneous Manufacturing Indus.	39.9	40.8	350.72	365.57	8.79	8.96
Nondurable Goods	39.8	39.6	398.80	396.40	10.02	10.01
Food and Kindred Products	38.8	39.2	358.90	361.42	9.25	9.22
Apparel and Textile Products	36.3	36.1	253.74	250.17	6.99	6.93
Paper and Allied Products	42.2	41.7	405.54	392.40	9.61	9.41
Printing and Publishing	39.1	38.2	461.38	456.49	11.80	11.95
Chemicals and Allied Products	42.8	43.1	520.88	524.96	12.17	12.18
Rubber and Plastic Products	42.8	42.8	391.62	388.20	9.15	9.07
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.6	41.3	$477.57	$469.58	$11.48	$11.37
Durable Goods	43.2	42.5	526.61	508.73	12.19	11.97
Nondurable Goods	39.5	39.8	416.73	421.48	10.55	10.59

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

In the Baltimore Metropolitan Area, a decline of 0.1 percentage points lowered the regional unemployment rate to 4.4 percent in March--a rate significantly below last March's estimate of 4.9 percent. Within the area, jobless rates declined in Baltimore, Carroll, Harford, and Queen Anne's counties and held steady in the remaining jurisdictions. The largest decline occurred in Queen Anne's County where the paring of 106 persons from the unemployment rolls caused the rate to drop back from 4.0 percent to 3.3 percent. Howard County, for the second consecutive month, had the lowest unemployment rate statewide. Throughout the region, seasonal hiring added to payrolls in construction, eating and drinking establishments, hotels, and in personal, business, amusement and health services.

MARYLAND'S D.C. SUBURBS

The jobless rate in Maryland's D.C. suburbs dropped marginally from 2.9 percent in February to 2.8 percent in March. During March, more than 6,500 suburbanites entered the job market in search of employment. The regional employment gain, of 7,159 persons, was more than enough to offset this increase and sufficiently strong enough to reduce unemployment volume by nearly 600 persons. Within the area, Charles and Frederick were the only counties to show any measurable activity. In Charles, joblessness rose slightly to 2.8 percent while, in Frederick, the rate receded from 4.1 percent in February to 3.5 percent in March. In the D.C. area, hiring activity during March was strongest in construction and services.

WESTERN MARYLAND

Western Maryland, although continuing to top the list with a March unemployment rate of 7.1 percent, showed the most improvement over the month with a drop of 0.5 percentage points. Nearly 75.0 percent of the statewide unemployment decline occurred in the western area. Unemployment rates dropped back from month-ago and year-ago levels in each of the western counties. In Washington County, the withdrawal of an estimated 276 persons from the labor force was, in large part, responsible for reducing the local unemployment rate to 5.5 percent in March. Although manufacturing employment dropped back in March, the regional job market benefited from gains in construction, trade, and services.

BALANCE OF STATE

In the Balance of State area, a decline of 907 persons on the region's jobless rolls helped ease the area's unemployment rate down from 6.5 percent to 6.1 percent. Monthly unemployment rates declined in each of the shore counties, with the exception of St. Mary's and Wicomico. In St. Mary's, labor force expansion outpaced employment gains, causing joblessness to rise from 4.2 percent to 4.6 percent. In Wicomico, on the other hand, declining employment was primarily responsible for a slight increase, from 5.0 percent to 5.1 percent, in the county's jobless rate. Within the region, local unemployment rates formed a wide range, spanning from a low of 3.5 percent in Talbot to a high of 12.8 percent in Somerset.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--MARCH 1989

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Mar.1989	Feb.1989	Mar.1989	Feb.1989	Mar.1989	Feb.1989	Mar.1989	Feb.1989
Total Nonagricultural Employment	1120.5	1108.7	760.2	754.3	90.1	89.5	133.9	133.9
Manufacturing	130.9	130.7	36.2	36.0	15.6	15.8	23.7	24.0
Durable Goods	74.2	74.4	18.2	18.0	7.5	7.5	9.6	9.8
Nondurable Goods	56.7	56.3	18.0	18.0	8.1	8.3	14.1	14.2
Nonmanufacturing	989.6	978.0	724.0	718.3	74.5	73.7	110.2	109.9
Construction	73.2	70.4	66.4	63.9	6.5	6.2	9.8	9.8
Transportation & Public Utilities	54.8	54.4	29.4	29.2	5.1	5.0	7.5	7.5
Wholesale and Retail Trade	271.8	269.6	201.4	200.9	25.4	25.3	33.4	33.4
Wholesale Trade	66.5	66.2	36.2	36.1	-	-	-	-
Retail Trade	205.3	203.4	165.2	164.8	-	-	-	-
Finance, Insurance & Real Estate	77.4	77.4	44.2	43.9	3.3	3.3	4.7	4.7
Services and Mining	300.4	295.9	220.0	218.5	19.3	19.2	30.1	29.7
Total Government	212.0	210.3	162.6	161.9	14.9	14.7	24.7	24.8
Federal	52.7	52.5	70.2	70.1	1.9	1.9	6.7	6.7
State	65.5	65.4	20.6	20.3	4.7	4.7	5.0	5.0
Local	93.8	92.4	71.8	71.5	8.3	8.1	13.0	13.1

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

MARCH, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	MARCH	FEBRUARY*	MARCH	FEBRUARY*	MARCH	FEBRUARY*	MARCH	FEBRUARY*	MARCH '88
MARYLAND	2,492,715	2,477,771	2,392,432	2,374,811	100,283	102,960	4.0	4.2	4.5
BALTIMORE METROPOLITAN AREA	1,192,341	1,184,300	1,139,542	1,130,821	52,799	53,479	4.4	4.5	4.9
BALTIMORE CITY	343,092	340,290	319,390	316,945	23,702	23,345	6.9	6.9	7.6
ANNE ARUNDEL	213,414	211,852	207,018	205,433	6,396	6,419	3.0	3.0	3.3
BALTIMORE	386,117	383,675	371,657	368,812	14,460	14,863	3.7	3.9	4.2
CARROLL	62,416	62,066	60,094	59,634	2,322	2,432	3.7	3.9	3.9
HARFORD	80,970	80,805	77,412	76,820	3,558	3,985	4.4	4.9	5.1
HOWARD	90,800	90,087	88,953	88,272	1,847	1,815	2.0	2.0	2.2
QUEEN ANNE'S	15,533	15,524	15,019	14,904	514	620	3.3	4.0	4.6
D. C. AREA	993,200	986,632	965,496	958,337	27,704	28,295	2.8	2.9	3.1
CALVERT	23,242	23,074	22,242	22,077	1,000	997	4.3	4.3	4.5
CHARLES	47,831	47,390	46,476	46,131	1,355	1,259	2.8	2.7	3.2
FREDERICK	77,305	77,235	74,592	74,038	2,713	3,197	3.5	4.1	3.8
MONTGOMERY	424,667	421,654	415,279	412,200	9,388	9,454	2.2	2.2	2.4
PRINCE GEORGE'S	420,156	417,278	406,908	403,890	13,248	13,388	3.2	3.2	3.5
WESTERN MARYLAND	105,117	105,007	97,605	96,998	7,512	8,009	7.1	7.6	8.7
ALLEGANY	32,939	32,718	30,002	29,727	2,937	2,991	8.9	9.1	10.8
GARRETT	12,972	12,807	11,673	11,442	1,299	1,365	10.0	10.7	11.5
WASHINGTON	59,206	59,482	55,930	55,829	3,276	3,653	5.5	6.1	7.0
BALANCE OF STATE	202,056	201,831	189,787	188,655	12,269	13,176	6.1	6.5	6.7
CAROLINE	14,123	14,076	13,409	13,319	714	757	5.1	5.4	5.6
CECIL	34,642	34,966	32,635	32,576	2,007	2,390	5.8	6.8	6.7
DORCHESTER	17,154	17,390	15,707	15,815	1,447	1,575	8.4	9.1	8.4
KENT	9,096	9,001	8,648	8,377	448	624	4.9	6.9	5.2
ST. MARY'S	38,934	38,496	37,154	36,865	1,780	1,631	4.6	4.2	5.1
SOMERSET	11,303	11,168	9,851	9,729	1,452	1,439	12.8	12.9	13.4
TALBOT	17,078	16,905	16,486	16,233	592	672	3.5	4.0	3.3
WICOMICO	41,229	41,323	39,129	39,238	2,100	2,085	5.1	5.0	6.1
WORCESTER	18,497	18,506	16,768	16,503	1,729	2,003	9.3	10.8	10.8
[1] UNITED STATES	122,223,000	121,906,000	115,844,000	115,023,000	6,378,000	6,883,000	5.2	5.6	5.9

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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Maryland
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LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

April, 1989

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
APRIL, 1989

MARYLAND

The number of unemployed declined and employment rose in April as Maryland's job market displayed its usual springtime expansion. The jobless rate dropped from 4.0 percent in March to 3.8 percent in April, the lowest figure for April since 1970, and a considerable improvement over last April's rate of 4.5 percent. Unemployment has continued to abate this year since peaking in February.

Seasonal factors normally trigger a reduction in unemployment at this time of year (although in 1988 joblessness held steady between March and April), while the labor force makes a rebound. This year though, an unusually cool and rainy April, coupled with strike activity in the Baltimore Metropolitan Area, put a damper on job market activity. A particularly big boost in the labor force in March also moderated April's usual gains. Consequently, fewer jobseekers found employment in April than expected, resulting in a slight contraction in the state's labor force.

	April 1989	March 1989	April 1988
Civilian Labor Force	2,496,258	2,496,279	2,453,755
Total Employment	2,401,745	2,397,296	2,342,740
Total Unemployment	94,513	98,983	111,015
Unemployment Rate	3.8	4.0	4.5
National Civilian Unemployment Rate	5.1	5.2	5.3

An estimated 2,401,745 Marylanders were working in April, a modest gain of 4,449 from March, but about 59,000 more than last April. While another 94,513 were unable to find work, this was nevertheless an over the month reduction of 4,470 jobless. Since April of last year the number of unemployed has declined by over 16,500 persons. In part due to the relatively mild winter, each month of 1989 so far has recorded an unemployment rate significantly below the 1988 pace.

Nationally, unemployment dropped from 5.2 percent in March to 5.1 percent in April, as employment climbed while the number of unemployed receded. Maryland has continued to rank well below the national jobless level. In April the state was tied for 8th lowest unemployment rate in the nation.

Nonagricultural payroll employment advanced in April as seasonal factors spurred on the state's economy. A net gain of 6,800 jobs was recorded in the monthly establishment survey, with the entire increase occurring among nonmanufacturing concerns. Overall, an estimated 7,900 jobs were added in nonmanufacturing, while at the same time 1,100 others were lost in factories, mostly due to a major strike in transportation equipment.

Maryland's job market has advanced steadily since declining in January. However, payroll employment growth each month this year has been running well below last year's showing. This April's hiring activity amounted to less than half of that reported a year ago. An over the year gain of about 32,000 new jobs represents a moderate 1.5 percent increase in nonagricultural employment.

A number of factors appear to be involved in this growth slowdown: the aforementioned labor dispute, an unseasonably cool, wet spring, and the same economic pressures that are causing a national deceleration in new job creation. Low unemployment, higher interest rates, and the threat of inflation appear to be putting a break on the nation's fast moving job machine. An easing in the state's payroll expansion rate could only be good news to those employers feeling strapped by labor shortages.

Industry employment trends varied in April. Durable goods manufacturing suffered the only major setback (-1,200 over the month, and -3,100 over the year), primarily from strike activity, but also from weakness in electrical and electronic equipment, an industry that has been slumping nationwide. Makers of nondurable goods netted a mere 100 jobs. Most manufacturers registered little or no change. Last April producers fared somewhat better, with durable goods unchanged over the month, and nondurables adding 300 jobs.

Among nonmanufacturers growth was the norm, with the biggest gainers to be found in seasonally-sensitive businesses. Construction added the most jobs (3,500) of any division in April and, for the present, helped quell uncertainty in the industry caused by higher interest rates. Retail trade rose by 2,300 jobs in April, with most of the new employment in restaurants. Since a year ago retail has added 6,800 new positions, with expansion most notable in food stores, miscellaneous retail, general merchandise stores, and restaurants. Wholesale trade's gain of some 200 jobs was concentrated in distributors of nondurables. Services industries added another 1,600 workers over the month, with hiring strongest in amusement services, hotels/motels, and agricultural services. Since April 1988 services has accelerated at an above average rate, enlarging its payrolls by about 10,300.

Transportation, communication, and public utilities moved up 500 jobs in April. The transportation (other than railroad) component accounted for most of the increase. Finance, insurance, and real estate added about 400 positions, with most of the gains occurring among banks and other credit agencies.

Government was the only nonmanufacturer to register a drop in April. While both federal and state employment grew, a decline in local government, mainly in education, caused the public sector to recede by 700 jobs.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
APRIL 1989

Major Industry Group	April 1989	March 1989	April 1988
Total Nonagricultural Employment	2110.2	2103.4	2078.2
Manufacturing	205.1	206.2	208.2
Durable Goods	108.8	110.0	111.9
Nondurable Goods	96.3	96.2	96.3
Nonmanufacturing	1905.1	1897.2	1870.0
Mining	1.7	1.6	1.7
Construction	159.2	155.7	157.5
Transportation, Communication, and Public Utilities	96.3	95.8	94.5
Wholesale and Retail Trade	534.1	531.6	526.3
Wholesale Trade	113.3	113.1	112.3
Retail Trade	420.8	418.5	414.0
Finance, Insurance, and Real Estate	130.8	130.4	128.5
Services	570.1	568.5	559.8
Total Government	412.9	413.6	401.7
Federal	131.8	131.4	131.3
State	96.5	96.2	93.9
Local	184.6	186.0	176.5

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
APRIL 1989

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Apr.1989	Mar.1989	Apr.1989	Mar.1989	Apr.1989	Mar.1989
MARYLAND						
Manufacturing	41.4	41.3	$449.60	$451.82	$10.86	$10.94
Durable Goods	42.7	42.8	495.32	500.76	11.60	11.70
Lumber and Wood Products	38.2	36.9	325.46	311.07	8.52	8.43
Furniture and Fixtures	41.0	40.3	402.62	403.40	9.82	10.01
Stone, Clay & Glass Products	46.7	46.2	507.16	498.04	10.86	10.78
Primary Metal Industries	43.2	43.5	623.38	631.62	14.43	14.52
Fabricated Metals	41.0	40.0	411.23	393.20	10.03	9.83
Machinery, Exc. Electrical	43.6	44.0	525.38	537.24	12.05	12.21
Electronic and Electrical Equipment	42.5	42.2	422.88	415.25	9.95	9.84
Transportation Equipment	43.7	45.9	662.06	699.06	15.15	15.23
Instruments and Related	38.9	39.5	373.44	375.65	9.60	9.51
Miscellaneous Manufacturing Indus.	41.5	39.0	361.88	344.37	8.72	8.83
Nondurable Goods	40.0	39.7	402.80	401.37	10.07	10.11
Food and Kindred Products	39.5	38.3	366.96	357.34	9.29	9.33
Apparel and Textile Products	36.6	36.5	251.44	253.68	6.87	6.95
Paper and Allied Products	42.5	42.4	416.50	411.28	9.80	9.70
Printing and Publishing	38.8	38.8	464.44	467.93	11.97	12.06
Chemicals and Allied Products	42.8	43.3	517.88	530.86	12.10	12.26
Rubber and Plastic Products	42.8	42.9	390.34	387.82	9.12	9.04
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.2	41.3	$467.62	$474.54	$11.35	$11.49
Durable Goods	42.4	42.7	508.80	520.94	12.00	12.20
Nondurable Goods	36.4	36.4	420.15	418.97	10.53	10.58

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

The Baltimore Metropolitan Area's job market advanced in April, with unemployment dropping back 0.2 percentage points to 4.2 percent--a record low for the month. The number of employed increased in every jurisdiction, while the jobless rolls were reduced in all but Howard County. Unemployment rose slightly in Howard with the rate moving up 0.2 percentage points to 2.2 percent, still keeping Howard tied with Montgomery County for the state's lowest jobless level. Baltimore County's unemployment rate was unchanged in April, while all others recorded declines.

Nonagricultural payroll employment netted 6,200 new jobs in the metropolitan area in April. The gain of 6,800 workers by nonmanufacturers was diminished by the 600 positions that were lost in manufacturing. Employment in durable goods was depressed by a major strike in transportation equipment. In nonmanufacturing, all private sector divisions expanded, with the exception of finance, insurance, and real estate, which was unchanged. Construction and retail trade accounted for the most new growth. Trends in the public sector varied, with a loss overall of 400 jobs. Federal employment grew; state government was flat; and local government dropped as employment in education receded.

MARYLAND'S D.C. SUBURBS

Unemployment inched downward in Maryland's Washington area suburbs from 2.8 percent in March to 2.7 percent in April. Little overall change was recorded in the labor force. In Calvert, Charles, and Frederick counties declines were observed as a reduction in the number of unemployed outpaced the addition of new workers. In Montgomery and Prince George's Counties, modest gains were noted for both employed and unemployed, leaving the unemployment rate unchanged in Montgomery and causing a marginal rise in Prince George's. Montgomery, along with Howard County, has the state's lowest unemployment rate. Since last April the region's labor force has increased by over 27,000, while the number of unemployed has been reduced by about 5,450.

Payroll employment advanced by 3,500 positions, with wide variation among industry groups. Nine out of ten new jobs were in either construction or services. Gains were also reported in finance, insurance, and real estate, durable goods manufacture, and retail trade. A slight reduction in trucking caused transportation, communication, and public utilities to slip downward, as did wholesale trade. A marginal drop in federal jobs reduced total government by 100.

WESTERN MARYLAND

Western Maryland's job market moved forward in April as unemployment receded from 7.1 percent to 6.9 percent. More significant, however, was the reduction from last April's rate of 8.0 percent, setting a new low for April. The region still maintained the highest jobless level in Maryland, though, well above the statewide average. April's improvement was entirely due to an overall decline in the number of jobless, as resident employment activity was flat. Unemployment abated in Allegany and Garrett Counties, but rose in Washington County, as a brief shutdown in textiles swelled the unemployed ranks.

The establishment survey reported a net increase of about 300 nonagricultural jobs in April, all in nonmanufacturing, as manufacturing employment deceased by 100, due to the aforementioned shutdown. Job growth was strongest in services and mining (+600), with solid gains also observed in trade (+200). Employment in transportation, communication, and public utilities and finance, insurance, and real estate was unchanged over the month. Government employment decreased by 100, all at the local level.

BALANCE OF STATE

The Balance of State region recorded an unemployment drop of 0.5 percentage points over the month to a rate of 5.4 percent. As the area's heavily seasonal economy began picking up steam, joblessness subsided considerably in all but Somerset and Wicomico Counties. Unseasonably cool, wet weather impeded seafood harvests, delaying recalls in related food processors, and pushing up unemployment in Somerset in particular, as labor force entrants were unable to find work. Still, all counties registered a drop in joblessness from last April. The area improved from last year's rate of 6.1 percent, continuing a decade-long decline in unemployment.

An estimated 2,000 jobs, many of them seasonal recalls, were added to Balance of State payrolls in April. This gain represented the strongest growth rate for at-place employment of any area in Maryland. Half of this growth took place in services alone. Trade was responsible for the next largest share of new jobs, while finance, insurance, and real estate was another rapid growth area. Construction, transportation, communication, and public utilities, and durable goods manufacturing also took an upturn in April. Nondurable goods employment declined as jobs in food processing and printing/publishing were diminished. Government realized a net loss as job growth in state employment was negated by a reduction in local government.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--APRIL 1989

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Apr.1989	Mar.1989	Apr.1989	Mar.1989	Apr.1989	Mar.1989	Apr.1989	Mar.1989
Total Nonagricultural Employment	1124.3	1118.1	763.8	760.3	90.1	89.8	136.0	134.0
Manufacturing	130.0	130.6	36.3	36.1	15.5	15.6	23.7	23.8
Durable Goods	73.2	74.0	18.3	18.1	7.5	7.5	9.7	9.6
Nondurable Goods	56.8	56.6	18.0	18.0	8.0	8.1	14.0	14.2
Nonmanufacturing	994.3	987.5	727.5	724.2	74.6	74.2	112.3	110.2
Construction	75.4	72.8	68.0	66.3	6.2	6.5	10.1	9.8
Transportation & Public Utilities	55.3	54.8	29.2	29.3	5.1	5.1	7.6	7.5
Wholesale and Retail Trade	274.3	271.5	201.8	201.8	25.5	25.3	34.0	33.4
Wholesale Trade	67.3	66.6	36.2	36.3	-	-	-	-
Retail Trade	207.0	204.9	165.6	165.5	-	-	-	-
Finance, Insurance & Real Estate	77.3	77.3	44.5	44.2	3.3	3.3	4.9	4.7
Services and Mining	300.9	299.6	221.7	220.2	19.8	19.2	31.0	30.0
Total Government	211.1	211.5	162.3	162.4	14.7	14.8	24.7	24.8
Federal	53.4	52.7	70.0	70.1	1.9	1.9	6.7	6.7
State	65.8	65.8	20.6	20.6	4.7	4.7	5.1	5.0
Local	91.9	93.0	71.7	71.7	8.1	8.2	12.9	13.1

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

APRIL, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	APRIL	MARCH*	APRIL	MARCH*	APRIL	MARCH*	APRIL	MARCH*	APRIL'88
MARYLAND	2,496,258	2,496,279	2,401,745	2,397,296	94,513	98,983	3.8	4.0	4.5
BALTIMORE METROPOLITAN AREA	1,192,718	1,192,704	1,143,183	1,140,604	49,535	52,100	4.2	4.4	4.9
BALTIMORE CITY	343,020	343,054	320,410	319,687	22,610	23,367	6.6	6.8	7.8
ANNE ARUNDEL	213,604	213,546	207,679	207,211	5,925	6,335	2.8	3.0	3.3
BALTIMORE	386,970	386,280	372,844	372,003	14,126	14,277	3.7	3.7	4.4
CARROLL	61,927	62,435	60,286	60,150	1,641	2,285	2.6	3.7	2.8
HARFORD	80,548	80,981	77,659	77,484	2,889	3,497	3.6	4.3	4.4
HOWARD	91,199	90,870	89,237	89,036	1,962	1,834	2.2	2.0	2.3
QUEEN ANNE'S	15,449	15,537	15,067	15,033	382	504	2.5	3.2	3.7
D. C. AREA	996,313	996,065	969,512	968,607	26,801	27,458	2.7	2.8	3.3
CALVERT	23,175	23,295	22,335	22,314	840	981	3.6	4.2	4.7
CHARLES	47,892	47,940	46,669	46,625	1,223	1,315	2.6	2.7	3.0
FREDERICK	76,844	77,482	74,902	74,832	1,942	2,650	2.5	3.4	3.3
MONTGOMERY	426,473	425,909	417,007	416,617	9,466	9,292	2.2	2.2	2.7
PRINCE GEORGE'S	421,929	421,439	408,600	408,219	13,329	13,220	3.2	3.1	3.9
WESTERN MARYLAND	104,848	105,018	97,596	97,601	7,252	7,417	6.9	7.1	8.0
ALLEGANY	32,801	32,926	30,109	30,021	2,692	2,905	8.2	8.8	10.0
GARRETT	12,747	12,951	11,652	11,672	1,095	1,279	8.6	9.9	9.5
WASHINGTON	59,300	59,141	55,835	55,908	3,465	3,233	5.8	5.5	6.5
BALANCE OF STATE	202,378	202,492	191,452	190,485	10,926	12,007	5.4	5.9	6.1
CAROLINE	13,727	14,151	13,194	13,456	533	695	3.9	4.9	5.0
CECIL	34,589	34,696	33,009	32,746	1,580	1,950	4.6	5.6	5.9
DORCHESTER	17,423	17,180	16,177	15,772	1,246	1,408	7.2	8.2	6.5
KENT	9,191	9,114	8,847	8,680	344	434	3.7	4.8	5.2
ST. MARY'S	38,261	39,039	36,577	37,280	1,684	1,759	4.4	4.5	5.1
SOMERSET	11,894	11,325	10,212	9,899	1,682	1,426	14.1	12.6	14.5
TALBOT	16,724	17,128	16,262	16,545	462	583	2.8	3.4	3.5
WICOMICO	40,571	41,346	38,414	39,277	2,157	2,069	5.3	5.0	5.8
WORCESTER	19,998	18,513	18,760	16,830	1,238	1,683	6.2	9.1	7.3
UNITED STATES [1]	122,576,000	122,223,000	116,347,000	115,844,000	6,229,000	6,378,000	5.1	5.2	5.3

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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Maryland
Department of Economic &
Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

May and June, 1989

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
MAY AND JUNE, 1989

MARYLAND

Students and other seasonal workers in search of summer jobs, and graduates entering the job market, began to trickle into Maryland's labor force in May, and by June had swelled the labor force to its highest point of the year. May's unemployment rate inched up 0.1 percentage point from April to 3.9 percent, while June's rate rose to 4.3 percent, as the state's economy was unable to immediately absorb the rapid influx of new and returning workers.

In May, an estimated 2,405,920 Marylanders held jobs, up a modest 2,849 from April. Another 97,228 were unemployed, an over the month increase of 3,045. Since May of last year the ranks of the employed have grown by almost 69,000, while the number of jobless has decreased by a sizable 17,500. May's unemployment rate was down 0.8 percentage points from a year prior, and at 3.9 percent, represents the lowest level for May in fifteen years.

Statistics for June were more dramatic. Employment expanded by 49,681 over the month, to total 2,455,601 persons. At the same time, an additional 13,810 were jobless, raising the number of unemployed to 111,038. The June employment and unemployment figures constitute the highest levels for each of those components so far this year. In addition, June's jobless rate of 4.3 percent was also the highest of the year. June is usually a dynamic month for the labor market and often one of peak unemployment. A comparison with 1988 is uniformly positive, however. Almost 82,000 more Marylanders were working this June than last. Over 3,000 fewer were unemployed, while the unemployment rate had receded from 4.6 percent.

Nationally, unemployment decreased marginally from 5.1 percent in April, to 5.0 percent in May, before rising to 5.5 percent in June. The labor force advanced throughout the period. In May a decline in the number of unemployed occurred, while employment grew. June saw significant gains in both labor force components.

	June 1989	May 1989	April 1989
Civilian Labor Force	2,566,639	2,503,148	2,497,254
Total Employment	2,455,601	2,405,920	2,403,071
Total Unemployment	111,038	97,228	94,183
Unemployment Rate	4.3	3.9	3.8
National Civilian Unemployment Rate	5.5	5.0	5.1

The May establishments survey recorded an increase of some 13,400 nonagricultural jobs over the month, as seasonal hiring in Maryland intensified. Growth was noted throughout the private sector. Only the federal government (-200) showed a slight decline. Manufacturing payrolls rose a modest

300 jobs, all among durable goods producers. Notable were a sizable upswing in food processing and a moderate drop in printing/publishing. Nonmanufacturers added 13,100 more positions in May, as retail trade and services topped the list with gains of 4,700 each. Within those two industries general merchandise stores and health services had the largest increases. Construction added 800 more positions; wholesale trade another 300; finance, insurance and real estate expanded by 400. Local government, bolstered by both recalls and new hires, rose by 2,400. Mining, transportation, communication and public utilities, as well as state government, were unchanged.

From May 1988 to May 1989 payroll employment advanced by a total of 33,600 jobs. Trends varied widely by industry division. While nondurable goods manufacturers expanded considerably, durables lost more than twice as many positions, largely the result of a transportation equipment strike that was in effect during May 1989. Other industries that fared poorly over the year were construction and transportation, communication, and public utilities. Despite construction's overall decline, heavy construction contractors improved considerably. All other major industries increased, with services being the largest gainer. Two out of every five new services jobs were in the health services area. Within retail trade, general merchandise stores showed solid gains. In the area of finance, nonbank credit agencies expanded. All levels of government took an upturn, with local public schools adding the most new positions. Employment in state colleges and universities grew over the year as well.

Nonagricultural payroll jobs accelerated another 16,700 in June as positive seasonal activity greatly surpassed the negative factors. Manufacturing employment rose 1,900. Both durable (+500) and nondurable (+1,400) goods manufacturers advanced. Notable gains in durables were observed in electric/electronics equipment, while under nondurables, food and kindred products took a significant seasonal jump. Nonmanufacturing netted 11,800 more positions as industry trends varied. Services topped all gainers, adding 8,800 more workers. Health services grew strongly, as did the seasonal amusement and recreation services, while private education services dropped off sharply as the school year ended. With 4,600 more jobs retail trade was the next highest growth area, followed by construction with 2,500. Finance, insurance, and real estate surged ahead over the month, adding 2,000 more, while wholesale trade gained 400. Mining was unchanged. Overall, government lost 7,200 jobs, with seasonal factors dominating. Federal government rose 1,200, mostly in the defense area, including many student summer positions. State employment receded by 4,300 with summer layoffs at public colleges and universities. Local government hires of summer recreational and other seasonal help were easily eclipsed by losses due to school summer vacations netting a drop of 4,100.

June's over-the-year payroll gains totalled 34,000 nonagricultural jobs, with the economy sending out mixed signals. Manufacturers took a loss of 3,200 positions, all in durable goods, as the labor dispute in transportation equipment continued through the June 1989 survey period, and electric/electronic equipment employment contracted. Nonmanufacturing netted 37,200 more jobs since June 1988. Losses occurred in mining, construction (though heavy construction employment rose) and transportation, communications, and public utilities. The biggest gainer was services (with health and private education services up the most), followed by government. Both wholesale and retail trade expanded, with general merchandise stores taking a big upturn. Finance, insurance, and real estate, especially in the area of nonbank credit agencies, also moved forward.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JUNE 1989

Major Industry Group	June 1989	May 1989	April 1989
Total Nonagricultural Employment	2140.2	2126.5	2113.1
Manufacturing	207.5	205.6	205.3
Durable Goods	109.3	108.8	108.8
Nondurable Goods	98.2	96.8	96.5
Nonmanufacturing	1932.7	1920.9	1907.8
Mining	1.7	1.7	1.7
Construction	162.6	160.1	159.3
Transportation, Communication, and Public Utilities	95.8	95.1	95.1
Wholesale and Retail Trade	545.3	540.3	535.3
Wholesale Trade	114.5	114.1	113.8
Retail Trade	430.8	426.2	421.5
Finance, Insurance, and Real Estate	133.4	131.4	131.0
Services	584.4	576.0	571.3
Total Government	409.1	416.3	414.1
Federal	133.9	132.7	132.9
State	92.2	96.5	96.5
Local	183.0	187.1	184.7

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
JUNE 1989

Major Industry Grouping	AVERAGE WEEKLY HOURS			AVERAGE WEEKLY EARNINGS			AVERAGE HOURLY EARNINGS		
	June 1989	May 1989	April 1989	June 1989	May 1989	April 1989	June 1989	May 1989	April 1989
MARYLAND									
Manufacturing	41.2	41.1	41.4	$445.78	$444.70	$450.43	$10.82	$10.82	$10.88
Durable Goods	42.0	42.3	42.8	485.52	487.30	496.91	11.56	11.52	11.61
Lumber and Wood Products	40.3	39.2	38.4	337.71	335.94	327.17	8.38	8.57	8.52
Furniture and Fixtures	40.7	39.6	40.5	407.81	391.25	399.33	10.02	9.88	9.86
Stone, Clay & Glass Products	46.5	43.4	47.0	504.99	463.51	517.00	10.86	10.68	11.00
Primary Metal Industries	42.2	42.4	42.7	649.46	609.71	612.32	15.39	14.38	14.34
Fabricated Metals	40.3	40.3	40.7	397.36	395.34	400.08	9.86	9.81	9.83
Machinery, Exc. Electrical	42.2	43.5	43.9	514.84	540.27	538.65	12.20	12.42	12.27
Electronic and Electrical Equipment	43.5	43.2	43.1	437.18	425.09	429.71	10.05	9.84	9.97
Transportation Equipment	39.1	43.5	43.9	550.92	635.54	661.13	14.09	14.61	15.06
Instruments and Related	40.8	39.8	39.6	379.44	372.13	376.20	9.30	9.35	9.50
Miscellaneous Manufacturing Indus.	39.8	38.1	39.0	358.20	333.76	341.25	9.00	8.76	8.75
Nondurable Goods	40.3	39.9	39.9	405.82	402.59	403.39	10.07	10.09	10.11
Food and Kindred Products	40.5	39.4	39.1	381.92	369.97	365.59	9.43	9.39	9.35
Apparel and Textile Products	37.5	36.8	37.2	255.00	249.50	254.82	6.80	6.78	6.85
Paper and Allied Products	42.5	42.4	41.6	403.75	403.65	395.20	9.50	9.52	9.50
Printing and Publishing	38.7	38.5	38.8	471.75	470.47	469.09	12.19	12.22	12.09
Chemicals and Allied Products	42.5	43.0	42.9	505.33	520.73	524.24	11.89	12.11	12.22
Rubber and Plastic Products	43.5	43.0	43.2	399.33	388.72	400.03	9.18	9.04	9.25
BALTIMORE METROPOLITAN AREA									
Manufacturing	41.4	41.2	41.5	$472.79	$465.97	$472.69	$11.42	$11.31	$11.39
Durable Goods	41.8	41.9	42.8	507.45	501.12	516.60	12.14	11.96	12.07
Nondurable Goods	40.9	40.5	40.0	432.31	426.87	422.40	10.57	10.54	10.56

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

The Baltimore Metropolitan Area's labor force moved forward slowly in May, as a modest 2,142 entrants raised the total to 1,105,735. Resident employment increased by only 361, while another 1,781 persons became unemployed. As a result, area unemployment rose from 4.1 to 4.3 percent. All jurisdictions saw a rise in both employment and unemployment, as well as the unemployment rate. Area jobless rates varied, from a low of 2.3 percent in Howard County (also the lowest rate in the state) to a high of 6.8 percent in Baltimore City. Since May of 1988 the metro area labor force has expanded by nearly 18,000, as the number of employed grew while the number and rate of unemployment were both reduced.

In June, the BMA's labor force became much more active. Another 27,258 participants were added, boosting the total to 1,222,993. Both resident employment and unemployment increased by 20,377 and 6,881, respectively. The jobless rate climbed in all jurisdictions, peaking in Baltimore City at 7.3 percent and reaching a metro area (and state) low in Howard at 2.6 percent. At 4.8 percent, this June's unemployment rate for the BMA is 0.4 percentage points below last June's.

The establishment survey for the Baltimore Metropolitan Area reported a gain of 6,700 jobs in May. An increase of 7,000 in nonmanufacturing was diminished by a loss of 300 in manufacturing. Slight reductions were noted in transportation equipment production and in printing/publishing. Among nonmanufacturers, retailers saw the largest growth (+2,400), followed by services (+1,700). Elsewhere in the private sector construction added 1,000 jobs, transportation, communication, and public utilities gained 400, wholesale trade 200, and finance, insurance, and real estate 100. Mining was unchanged over the month. Overall, government rose by 1,200, as federal employment receded by 200, while state government added 100 and local governments 1,300.

From May 1988 to May 1989 nonfarm employment rose by 16,800, with nonmanufacturers picking up 19,800 more workers, while manufacturers lost 3,000. Sizable losses were incurred by transportation equipment and electric and electronics equipment producers. Services was the top performer among nonmanufacturers, with health services responsible for much of the new growth. All other nonmanufacturers increased over the year, with the exception of mining, which was unchanged.

In June the BMA's payrolls increased another 5,800 from May. Manufacturing added 600 positions, with gains in both durable and nondurable goods. Nonmanufacturers netted 5,200 more workers. Services (+2,600) was responsible for half the over-the-month growth, despite a substantial decline in private education employment. Retail trade added 1,100 more workers, and wholesale another 800. Increased construction activity expanded that industry by 1,100. Transportation, communication, and public utilities rose by 400 and finance, insurance, and real estate by 800. Public sector trends were dominated by seasonal declines in education: state government was down 300 and local governments lost 1,400. The federal government added 100.

Job creation between June 1988 and June 1989 was more restrained than the May to May activity, with the net gain reaching 14,200. Nonmanufacturing's advance of 18,100 was modified by a decline in manufacturing of 3,900. A substantial drop in durable goods employment was again attributable to transportation equipment and electric/electronics manufacturers. Among nonmanufacturers mining was unchanged and construction rather weak. At the same time services accelerated strongly, while the remaining nonmanufacturers advanced at varying paces.

MARYLAND'S D.C. SUBURBS

Unemployment crept upward in the Washington area suburbs in May as seasonal factors impacting negatively on the labor market outpaced positive forces. The area labor force rose by 1,338 to total 997,783 as the number of employed fell by 1,114, while the number of jobless increased by 2,449. The unemployment rate rose 0.2 percentage points over the month to 2.9 percent. Within the area, rates were uniformly low, with Montgomery County, at 2.8 percent, posting the lowest rate locally, and second lowest statewide. Developments since last May have been positive: the number of employed residents is up by over 35,000; the number of unemployed is down by nearly 3,900, and the rate of unemployment down by one half of one percent.

In June seasonal pressures pushed the Washington area's labor force up over the one million mark for the first time. An estimated 24,678 entrants swelled the labor force to 1,022,461, as employment rose by 18,952 and the unemployed ranks gained 5,776. The jobless rate moved up to 3.4 percent--the same as last June. A year ago, however, there were almost 44,000 fewer employed residents, and about 2,000 fewer unemployed.

Nonfarm payroll employment in the Washington suburbs increased 4,600 in May. Manufacturers added 300 more workers, with both durable and nondurable goods expanding. Nonmanufacturers gained 4,300 more, with varying industry trends. Mining and finance, insurance, and real estate showed no growth. Retail trade and services advanced the most, with each adding 1,100 more jobs. Construction was up by 800 jobs; transportation, communication, and public utilities gained 400; and wholesale trade added 200. The public sector expanded by 700, with growth in federal and local government jobs, while state employment receded as university employment was reduced for the summer.

Between May 1988 and May 1989 a total of 20,900 more jobs were added to Maryland's Washington metropolitan area. Manufacturing absorbed 1,100, and nonmanufacturing, 19,800. All industry divisions rose, with the exception of mining and wholesale trade, both of which dropped. Some notable nonmanufacturing gains were observed in transportation other than railroad, and general merchandise stores. Positive manufacturing trends were most evident in printing/publishing and electric/electronics equipment.

The June establishment survey reported a net increase of 1,100 jobs over the month, as industry performance varied significantly. Manufacturers lost 100 positions, all in durable goods, as nondurables were unchanged. Nonmanufacturing trends ranged from an additional 2,000 more jobs in services to a loss of 3,800 in government. Gains in federal government were eclipsed by education-related losses in state and local governments. Advancing industries included: construction (+400), transportation, communication, and public utilities (+200), wholesale trade (+200), retail trade (+1,400), and finance, insurance, and real estate (+800). Mining did not change.

Since last June a total of 20,900 new jobs have been created by the Washington area economy. An estimated 800 of them were in manufacturing, evenly divided between durable and nondurable goods producers. Another 20,800 were spread throughout nonmanufacturers. Local government added the most new jobs, followed by retail trade and services.

WESTERN MARYLAND

The job market strengthened in western Maryland in May, as unemployment dropped 0.3 percentage points to 6.6 percent of the labor force. An estimated 262 fewer persons were unemployed than in April, while 1,093 more had jobs. The labor force increased by 813 to total 195,655. Within the region the number and rate of unemployment rose marginally in Allegany while declining in Garrett and Washington. Each county saw a rise in the number of employed residents. Although the area maintained the state's highest jobless rate, the improvement from last May's rate of 8.3 percent was significant.

June brought further good news to western Maryland's labor market as unemployment receded to 6.3 percent. The western region was the only area in Maryland to post a June decline. The labor force expanded by 1,499, with 1,645 more employed, and 146 fewer unemployed. Compared with June of last year, the number of employed was up, the number of unemployed down, and the rate of unemployment had backpeddled a considerable 1.2 percentage points.

The establishment survey for May recorded an over the month job increase of 900. Manufacturing (nondurable goods) declined by 100, while nonmanufacturing rose by 1,000. Construction topped all industry divisions with an addition of 500 more positions. Services and mining gained 200. Transportation, communication, and public utilities, wholesale and retail trade, and finance, insurance, and real estate all reported no changes. Public employment advanced by 300, with state and local government gaining, as federal employment was static.

May's payroll employment total of 90,900 represented a net increase since last May of 1,000 jobs. Manufacturers of both durables and nondurables lost a total of 600 workers, while nonmanufacturing concerns advanced by 1,600.

In June nonfarm employment rose by 300. Manufacturing was flat, as gains by nondurable goods makers were eliminated by an equal loss among producers of durables. Transportation equipment manufacturers were primarily responsible for the decline. Nonmanufacturing trends varied. Services increased by 200. Construction, wholesale and retail trade, and finance, insurance, and real estate each added 100 more employees. Transportation, communication, and public utilities were unchanged over the month. Government lost 200 jobs, all in the local sector, as public education employment was reduced for the summer.

From June 1988 to June 1989 western Maryland's nonagricultural jobs grew by 600. A total of 600 jobs were lost in manufacturing--200 in durable goods and 400 in nondurable goods. Declines in apparel/textiles production was one factor in the loss. Nonmanufacturers rose by 1,200, with expansion in all industry divisions except transportation, communication, and public utilities, which declined. The transportation component was a weak area.

BALANCE OF STATE

Unemployment receded in the balance of state area in May, as the number of jobless was reduced by 923, and the unemployment rate slipped from 5.3 percent to 4.9 percent. An additional 2,509 persons joined the ranks of the employed as the labor force rose to 203,977. Individual county trends varied, with some reporting an increase in unemployment and others, a decline. The area's overall improvement can be attributed to seasonal expansions and recalls in the food processing industry. Since last May, resident employment has risen, unemployment declined, and the unemployment rate has fallen from 6.3 percent.

June displayed a marked increase in job market activity in the balance of state region. Another 10,052 residents joined the labor force, adding 8,704 more to the employed component, and 1,348 more to the unemployed. Joblessness rose to 5.3 percent, with divergent trends among the counties. Higher unemployment in Dorchester and Somerset Counties was primarily due to the occurrence of three temporary layoffs in food processing, two of which were vacation shutdowns. Somerset posted the state's highest jobless rate for both May and June. Last June, regional unemployment was slightly higher.

Nonfarm payroll employment rose 2,900 in the balance of state area in May. Manufacturing increased by 200, all in nondurable goods, as food processors expanded. Nonmanufacturers added 2,700 more jobs. The top gainer was wholesale and retail trade with 1,400 more positions. Services/mining was up 700; finance, insurance, and real estate gained 200; and construction added 100. Transportation, communication, and public utilities was reduced by 100, as transportation (other than railroads) dropped. Total government rose by 400, with growth recorded in both federal and local employment, as state jobs declined.

Between May 1988 and May 1989 at place employment expanded by 1,100. Manufacturers accounted for 600 of the new jobs, most notably in food processing. Nonmanufacturers netted 500 more positions, with widely varying trends among the different industry divisions. Construction, wholesale and retail trade, and transportation, communication, and public utilities all declined, while the remaining divisions gained employment.

June's establishment survey registered further growth in the balance of state economy, as 4,600 more jobs were created. Manufacturers of durable goods lost 100 jobs, while producers of nondurables added 700. Of note was a sizable gain in food processing. Nonmanufacturers increased their payrolls by 4,000 workers. Half (2,000) of the new jobs were in the trade alone. Services/mining expanded by 1,600, construction by 500, finance, insurance, and real estate by 300, and transportation, communication, and public utilities by 100. Government employment was reduced by 500, as slight gains in federal and local governments were negated by a considerable drop in state jobs.

Comparing this June with last, a rather stagnant local economy emerges. Over the year, nonfarm employment declined by 100 overall, with mixed signals from different industries. Manufacturing, construction, wholesale and retail trade, and transportation, communication, and public utilities all experienced losses, while services/mining, finance, insurance, and real estate, and government all increased. A possible factor may be this year's unusually wet weather which put a damper on the seafood industry and could be hampering the tourist economy as well.

BALTIMORE METROPOLITAN AREA
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JUNE 1989

Major Industry Group	June 1989	May 1989	April 1989
Total Nonagricultural Employment	1136.3	1130.5	1123.8
Manufacturing	130.2	129.6	129.9
Durable Goods	73.4	73.0	73.1
Nondurable Goods	56.8	56.6	56.8
Nonmanufacturing	1006.1	1000.9	993.9
Mining	0.3	0.3	0.3
Construction	77.4	76.3	75.3
Transportation, Communication, and Public Utilities	56.0	55.6	55.2
Wholesale and Retail Trade	278.4	276.5	273.9
Wholesale Trade	68.1	67.3	67.1
Retail Trade	210.3	209.2	206.8
Finance, Insurance, and Real Estate	78.2	77.4	77.3
Services	305.2	302.6	300.9
Total Government	210.6	212.2	211.0
Federal	53.2	53.1	53.3
State	65.7	66.0	65.9
Local	91.7	93.1	91.8

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND PORTION D.C. SUBURBS
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JUNE 1989

Major Industry Group	June 1989	May 1989	April 1989
Total Nonagricultural Employment	768.8	767.7	763.1
Manufacturing	36.6	36.7	36.4
Durable Goods	18.4	18.5	18.4
Nondurable Goods	18.2	18.2	18.0
Nonmanufacturing	732.2	731.0	726.7
Mining	0.5	0.5	0.5
Construction	69.1	68.7	67.9
Transportation, Communication, and Public Utilities	28.2	28.0	27.6
Wholesale and Retail Trade	204.9	203.3	202.0
Wholesale Trade	36.6	36.4	36.2
Retail Trade	168.3	166.9	165.8
Finance, Insurance, and Real Estate	45.4	44.6	44.6
Services	224.4	222.4	221.3
Total Government	159.7	163.5	162.8
Federal	71.5	70.7	70.5
State	18.5	20.4	20.6
Local	69.7	72.4	71.7

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

WESTERN MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JUNE 1989

Major Industry Group	June 1989	May 1989	April 1989
Total Nonagricultural Employment	91.2	90.9	90.0
Manufacturing	15.4	15.4	15.5
Durable Goods	7.4	7.5	7.5
Nondurable Goods	8.0	7.9	8.0
Nonmanufacturing	75.8	75.5	74.5
Mining	-	-	-
Construction	6.6	6.5	6.0
Transportation, Communication, and Public Utilities	5.1	5.1	5.1
Wholesale and Retail Trade	25.6	25.5	25.5
Wholesale Trade	-	-	-
Retail Trade	-	-	-
Finance, Insurance, and Real Estate	3.4	3.3	3.3
Services**	20.1	19.9	19.7
Total Government	15.0	15.2	14.9
Federal	1.9	1.9	1.9
State	5.0	5.0	4.8
Local	8.1	8.3	8.2

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

**Includes mining.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

BALANCE OF STATE
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JUNE 1989

Major Industry Group	June 1989	May 1989	April 1989
Total Nonagricultural Employment	143.5	138.9	136.0
Manufacturing	24.4	23.8	23.6
Durable Goods	9.6	9.7	9.7
Nondurable Goods	14.8	14.1	13.9
Nonmanufacturing	119.1	115.1	112.4
Mining	-	-	-
Construction	10.7	10.2	10.1
Transportation, Communication, and Public Utilities	7.6	7.5	7.6
Wholesale and Retail Trade	37.4	35.4	34.0
Wholesale Trade	-	-	-
Retail Trade	-	-	-
Finance, Insurance, and Real Estate	5.4	5.1	4.9
Services**	33.3	31.7	31.0
Total Government	24.7	25.2	24.8
Federal	6.8	6.7	6.6
State	4.3	5.0	5.1
Local	13.6	13.5	13.1

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

**Includes mining.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
1100 NORTH EUTAW STREET
BALTIMORE, MARYLAND 21201

STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

MAY, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	MAY	APRIL*	MAY	APRIL*	MAY	APRIL*	MAY	APRIL*	MAY' 88
MARYLAND	2,509,868	2,497,254	2,414,958	2,403,071	94,910	94,183	3.8	3.8	4.7
BALTIMORE METROPOLITAN AREA	1,200,365	1,193,593	1,150,338	1,144,122	50,027	49,471	4.2	4.1	5.1
BALTIMORE CITY	345,321	343,303	322,416	320,673	22,905	22,630	6.6	6.6	8.0
ANNE ARUNDEL	215,051	213,773	208,979	207,850	6,072	5,923	2.8	2.8	3.5
BALTIMORE	389,217	387,215	375,178	373,150	14,039	14,065	3.6	3.6	4.6
CARROLL	62,341	61,992	60,663	60,335	1,678	1,657	2.7	2.7	2.8
HARFORD	81,085	80,593	78,146	77,723	2,939	2,870	3.6	3.6	4.5
HOWARD	91,806	91,249	89,796	89,310	2,010	1,939	2.2	2.1	2.5
QUEEN ANNE'S	15,545	15,467	15,161	15,079	384	388	2.5	2.5	4.7
D. C. AREA	1,000,477	996,448	972,043	969,756	28,434	26,692	2.8	2.7	3.4
CALVERT	23,359	23,182	22,393	22,340	966	842	4.1	3.6	4.9
CHARLES	48,102	47,889	46,791	46,681	1,311	1,208	2.7	2.5	3.3
FREDERICK	77,188	76,855	75,097	74,921	2,091	1,934	2.7	2.5	3.2
MONTGOMERY	428,186	426,519	418,095	417,112	10,091	9,407	2.4	2.2	2.8
PRINCE GEORGE'S	423,642	422,004	409,667	408,703	13,975	13,301	3.3	3.2	4.0
WESTERN MARYLAND	105,053	104,824	98,294	97,627	6,759	7,197	6.4	6.9	8.3
ALLEGANY	33,105	32,803	30,431	30,135	2,674	2,668	8.1	8.1	9.6
GARRETT	12,939	12,732	11,953	11,654	986	1,078	7.6	8.5	9.4
WASHINGTON	59,009	59,289	55,910	55,838	3,099	3,451	5.3	5.8	7.3
BALANCE OF STATE	203,971	202,391	194,282	191,568	9,689	10,823	4.8	5.3	6.3
CAROLINE	14,051	13,767	13,439	13,211	612	556	4.4	4.0	5.6
CECIL	34,611	34,492	32,997	32,966	1,614	1,526	4.7	4.4	5.9
DORCHESTER	17,100	17,428	16,160	16,199	940	1,229	5.5	7.1	8.7
KENT	9,210	9,195	8,937	8,857	273	338	3.0	3.7	7.7
ST. MARY'S	38,197	38,249	36,535	36,572	1,662	1,677	4.4	4.4	5.1
SOMERSET	11,827	11,893	10,836	10,228	991	1,665	8.4	14.0	11.9
TALBOT	16,720	16,741	16,016	16,284	704	457	4.2	2.7	5.3
WICOMICO	40,182	40,619	38,165	38,467	2,017	2,152	5.0	5.3	5.8
WORCESTER	22,073	20,007	21,197	18,784	876	1,223	4.0	6.1	5.5
[1] UNITED STATES	123,196,000	122,576,000	117,039,000	116,347,000	6,156,000	6,229,000	5.0	5.1	5.4

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

JUNE, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JUNE	MAY*	JUNE	MAY*	JUNE	MAY*	JUNE	MAY*	JUNE' 88
MARYLAND	2,566,639	2,503,148	2,455,601	2,405,920	111,038	97,228	4.3	3.9	4.6
BALTIMORE METROPOLITAN AREA	1,222,993	1,195,735	1,164,860	1,144,483	58,133	51,252	4.8	4.3	5.2
BALTIMORE CITY	352,357	344,245	326,486	320,774	25,871	23,471	7.3	6.8	8.0
ANNE ARUNDEL	218,850	214,172	211,617	207,915	7,233	6,257	3.3	2.9	3.5
BALTIMORE	396,690	387,617	379,914	373,268	16,776	14,349	4.2	3.7	4.7
CARROLL	63,242	62,076	61,429	60,355	1,813	1,721	2.9	2.8	3.0
HARFORD	82,721	80,754	79,132	77,748	3,589	3,006	4.3	3.7	4.5
HOWARD	93,319	91,397	90,929	89,339	2,390	2,058	2.6	2.3	2.5
QUEEN ANNE'S	15,815	15,474	15,353	15,084	462	390	2.9	2.5	3.8
D. C. AREA	1,022,461	997,783	987,594	968,642	34,867	29,141	3.4	2.9	3.4
CALVERT	23,759	23,307	22,751	22,315	1,008	992	4.2	4.3	5.0
CHARLES	49,046	47,982	47,539	46,627	1,507	1,355	3.1	2.8	3.3
FREDERICK	78,704	76,995	76,299	74,835	2,405	2,160	3.1	2.8	3.0
MONTGOMERY	437,237	426,941	424,784	416,632	12,453	10,309	2.8	2.4	2.8
PRINCE GEORGE'S	433,715	422,559	416,221	408,233	17,494	14,326	4.0	3.4	3.9
WESTERN MARYLAND	107,154	105,655	100,365	98,720	6,789	6,935	6.3	6.6	7.5
ALLEGANY	33,556	33,266	30,630	30,530	2,926	2,736	8.7	8.2	9.4
GARRETT	13,511	13,015	12,432	12,010	1,079	1,005	8.0	7.7	9.5
WASHINGTON	60,087	59,374	57,303	56,180	2,784	3,194	4.6	5.4	6.0
BALANCE OF STATE	214,029	203,977	202,781	194,077	11,248	9,900	5.3	4.9	5.5
CAROLINE	14,437	14,051	13,851	13,429	586	622	4.1	4.4	4.5
CECIL	35,939	34,508	33,672	32,879	2,267	1,629	6.3	4.7	6.0
DORCHESTER	17,791	17,116	16,531	16,155	1,260	961	7.1	5.6	8.6
KENT	9,338	9,205	8,991	8,930	347	275	3.7	3.0	3.8
ST. MARY'S	39,078	38,198	37,207	36,493	1,871	1,705	4.8	4.5	4.9
SOMERSET	12,474	11,871	11,303	10,859	1,171	1,012	9.4	8.5	8.6
TALBOT	16,948	16,726	16,312	16,000	636	726	3.8	4.3	4.5
WICOMICO	41,305	40,220	38,944	38,150	2,361	2,070	5.7	5.1	5.8
WORCESTER	26,719	22,082	25,970	21,182	749	900	2.8	4.1	3.5
[1] UNITED STATES	125,569,000	123,196,000	118,719,000	117,039,000	6,850,000	6,156,000	5.5	5.0	5.5

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

July, 1989

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
JULY, 1989

MARYLAND

Maryland's strong labor market showed signs of continued improvement in July as unemployment dropped to 3.9 percent of the labor force, down from June's 4.3 percent. The summer's influx of new and seasonal workers that had pushed up unemployment in June was largely absorbed by the economy in July.

Continuing a growth trend, the state's civilian labor force swelled to 2,614,132 persons in July. The number of employed Marylanders rose over the month by 55,942, while the jobless rolls receded by 8,574. An estimated 2,511,630 persons were working in July--a high for the year, and, an increase of about 100,300 from last year. The number of unemployed (102,502) declined by nearly 14,500 from the previous July, while at the same time, the jobless rate was lowered by 0.7 percentage points. This July marks the state's lowest unemployment rate for that month since 1970.

Throughout the state labor force activity was on the whole positive. Almost all jurisdictions recorded an upturn in resident employment. Several counties, however, did experience a rise in unemployment levels as a number of vacation and retooling shutdowns among some manufacturers resulted in some temporary layoffs.

Nationally, unemployment declined slightly from 5.5 percent in June to 5.3 percent in July. The number of employed persons was up over the month, while the number of unemployed was down. Last July joblessness in the U.S. stood at 5.5 percent.

	July 1989	June 1989	July 1988
Civilian Labor Force	2,614,132	2,566,764	2,528,290
Total Employment	2,511,630	2,455,688	2,411,321
Total Unemployment	102,502	111,076	116,969
Unemployment Rate	3.9	4.3	4.6
National Civilian Unemployment Rate	5.3	5.5	5.5

The monthly establishment survey for Maryland reported a net loss of some 8,300 jobs in July as gains throughout most of the private sector were easily eclipsed by large seasonal losses in state and local government education. Last July nonagricultural payroll employment receded by 2,000 over the month.

Manufacturing employment dropped by 300 between June and July. Durable goods producers added 300 workers while nondurables lost 600 (primarily due to vacation shutdowns among several apparel producers).

Nonmanufacturers in the private sector generally fared well over the month. While mining showed no change, the construction industry topped all gainers, adding 3,700 new positions. Retail trade had the second highest July growth, adding 1,900, while the much smaller wholesale trade rose by 200. Services expanded by 1,800, finance, insurance, and real estate by 1,100, and transportation, communication, and public utilities added 400. Public sector trends were dominated by the continued summer vacation layoffs of education staff. Federal employment grew by 100 jobs, while state government declined by 3,900, and local governments dropped 13,300 workers. All state and local government losses were sustained by schools, colleges, and universities, as noneducation employment rose over the month.

Since last July nonfarm employment in Maryland has risen by 27,700. All gains occurred among nonmanufacturers, as factory employment declined by a total of 3,800. Durable goods employment decreased by 3,500, almost all due to losses in transportation equipment and electric/electronic equipment production. Makers of nondurble goods lost 300, as employment in apparel/textile products and rubber/plastics products declined.

Nonmanufacturers expanded by a total of 31,500 over the year. Some industry groups lost employment, however. Mining dropped by 100; transportation, communication, and public utilities lost 500; and construction declined by 900, despite growth in heavy construction contracting. Strongest growth occurred in services, where 14,000 jobs were added. Sizable gains in health services were a factor. Trade was also a major source of new employment, as retail jobs increased by 5,800 (a significant number in general merchandise stores), and wholesale added 2,200. Finance, insurance, and real estate rose by 2,600, with much of the increase in nonbank credit agencies. Gains occurred throughout the public sector, with federal government adding 2,100 (mostly in civilian defense department employment), state government gaining 1,400, and local governments increasing by 4,900 (the majority of which was in education).

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
JULY 1989

Major Industry Group	July 1989	June 1989	July 1988
Total Nonagricultural Employment	2131.9	2140.2	2104.2
Manufacturing	206.8	207.1	210.6
Durable Goods	109.4	109.1	112.9
Nondurable Goods	97.4	98.0	97.7
Nonmanufacturing	1925.1	1933.1	1893.6
Mining	1.7	1.7	1.8
Construction	166.4	162.7	167.3
Transportation, Communication, and Public Utilities	96.3	95.9	96.8
Wholesale and Retail Trade	546.8	544.7	538.8
Wholesale Trade	114.8	114.6	112.6
Retail Trade	432.0	430.1	426.2
Finance, Insurance, and Real Estate	134.5	133.4	131.9
Services	586.8	585.0	572.8
Total Government	392.6	409.7	384.2
Federal	134.3	134.2	132.2
State	89.2	93.1	87.8
Local	169.1	182.4	164.2

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
JULY 1989

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	July 1989	June 1989	July 1989	June 1989	July 1989	June 1989
MARYLAND						
Manufacturing	41.4	41.1	$450.85	$445.52	$10.89	$10.84
Durable Goods	42.3	42.1	488.57	487.52	11.55	11.58
Lumber and Wood Products	40.4	39.9	342.19	338.35	8.47	8.48
Furniture and Fixtures	42.2	40.6	422.84	402.35	10.02	9.91
Stone, Clay & Glass Products	45.1	45.7	491.59	504.53	10.90	11.04
Primary Metal Industries	43.0	43.2	652.74	664.42	15.18	15.38
Fabricated Metals	39.8	40.2	399.19	402.00	10.03	10.00
Machinery, Exc. Electrical	41.1	42.0	504.71	509.04	12.28	12.12
Electronic and Electrical Equipment	45.2	43.6	448.38	428.59	9.92	9.83
Transportation Equipment	40.7	40.0	574.28	563.60	14.11	14.09
Instruments and Related	39.4	40.4	372.33	387.84	9.45	9.60
Miscellaneous Manufacturing Indus.	39.2	38.9	354.76	350.88	9.05	9.02
Nondurable Goods	40.4	40.2	412.08	405.62	10.20	10.09
Food and Kindred Products	42.1	40.4	399.11	380.16	9.48	9.41
Apparel and Textile Products	37.5	37.1	270.00	255.99	7.20	6.90
Paper and Allied Products	40.6	42.4	390.57	402.80	9.62	9.50
Printing and Publishing	38.3	38.5	472.62	467.78	12.34	12.15
Chemicals and Allied Products	42.2	42.3	503.45	508.02	11.93	12.01
Rubber and Plastic Products	43.9	44.1	403.88	409.25	9.20	9.28
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.3	41.5	$476.60	$475.18	$11.54	$11.45
Durable Goods	41.8	42.0	509.54	511.14	12.19	12.17
Nondurable Goods	40.7	40.9	437.93	433.54	10.76	10.60

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Unemployment abated in the Baltimore Metropolitan Area in July as employment grew and the labor force expanded to 1,246,625 persons. Area joblessness receded from 4.8 percent in June to 4.3 percent in July--the lowest figure for July since 1980 (when earliest comparable data are available). The number and percent of unemployed was significantly lower than a year ago, while employment had increased considerably. All jurisdictions experienced a rise in the level of employment in July, however, two counties also recorded modest gains in unemployment. Vacation shutdowns in apparel and footwear production were responsible for much of this increase. Howard County (along with Montgomery and Worcester) posted the state's lowest unemployment rate for July, as it has for each month this year.

The establishment survey for the Baltimore Metropolitan Area registered a decline of 1,800 nonfarm jobs in July. Almost all the loss occurred in state and local government education. Manufacturing was up 500 over the month, despite a slight drop in nondurable goods employment (due to the aforementioned layoffs). Nonmanufacturing jobs were reduced by 2,300. Transportation, communication, and public utilities experienced a moderate drop, while mining and retail trade were both unchanged. All other private sector industry groups rose. Total public employment declined. Since last July the BMA's payrolls have increased by 12,700. Manufacturers, however, lost a total of 3,600 jobs in the past year, all in durable goods factories. Electric/electronic equipment and transportation equipment producers were primarily responsible for the loss. Nonmanufacturing concerns added 16,300 positions over the year, as all industries, with the exception of mining, grew.

MARYLAND'S D.C. SUBURBS

The labor force in Maryland's Washington suburbs continued its sometimes slow but steady growth trend, reaching 1,037,207 persons in July. Resident employment swelled, while the number of jobless dropped over the month. The area unemployment rate declined from 3.4 percent in June to 2.9 percent in July. Jobless rates were uniformly low throughout the region, with Montgomery County tied with two other counties for the state's lowest unemployment figure. Unemployment was down from the 3.6 percent recorded a year ago and was, in fact, the lowest rate for July since comparable statistics began in 1975.

The metro area's nonagricultural payrolls declined by 5,900 in July. Manufacturers reported a net gain of 200 jobs, but 6,100 were lost in nonmanufacturing. State and local governments were responsible for almost all the loss, although transportation, communication, and public utilities recorded a slight drop as well. Mining was unchanged over the month, while the remaining industry groups rose. Services was the biggest gainer. Since July 1988 nonfarm employment has expanded by 16,600. Growth occurred in both manufacturing and nonmanufacturing. All industry groups increased, with the exception of mining and transportation, communication, and public utilities, which declined.

WESTERN MARYLAND

Unemployment in the western Maryland region inched downward 0.1 percent in July to 6.2 percent--a level far below past figures for the same month. The labor force rose to 109,463 as employment climbed, while unemployment was about unchanged. A slight increase in unemployment in Washington County was attributed to a brief layoff in the apparel/textile products industry. Compared with last July, area unemployment was up, unemployment had dropped, and the rate of unemployment was down from 7.9 percent.

Western Maryland's establishment survey reported an over the month loss of 800 payroll jobs. Both manufacturing and nonmanufacturing sustained losses. Temporary layoffs depressed nondurable goods employment, while summer vacation in public education reduced government jobs. Construction and transportation, communication, and public utilities were up marginally in July, while other industry groups showed no change. Nonfarm employment had expanded by 1,600 over a year ago. Manufacturing in the durable goods area declined by 400 since last July, much of it in transportation equipment. Nonmanufacturers rose by 2,000, with all industry groups gaining except transportation, communication, and public utilities, which dropped slightly.

BALANCE OF STATE

The labor force expanded to 220,835 persons in the Balance of State region in July as both the employment and unemployment components increased. Areawide unemployment rose a marginal 0.1 of one percent to 5.3 percent. Trends varied widely among counties. All but two registered gains in resident employment, while unemployment was more unstable. The region was responsible for both the state's highest and lowest jobless rates, as well as various levels in between. Vacation layoffs in electronics and food processing, and new model year retooling shutdowns by automakers in Wilmington, Delaware were primarily responsible for the area's instability. Labor force activity since last July has been positive, however: employment has increased, while both the number and rate of unemployment have declined.

Nonagricultural payroll employment declined by 200 between June and July. No change occurred in either durable or nondurable goods manufacturing. Among nonmanufacturers, trade and services were up over the month, while construction, transportation, communication, and public utilities, and finance, insurance, and real estate were flat. Total government decreased due to losses in local government. At place employment was up by only 300 jobs over the year. Growth occurred in services and government, while construction, trade, and transportation, communication, and public utilities all lost employment. Manufacturing and finance, insurance, and real estate were unchanged.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--JULY 1989

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	July 1989	June 1989	July 1989	June 1989	July 1989	June 1989	July 1989	June 1989
Total Nonagricultural Employment	1135.0	1136.8	763.6	769.5	91.1	91.9	143.8	144.0
Manufacturing	130.4	129.9	36.8	36.6	15.3	15.6	24.4	24.4
Durable Goods	73.6	73.0	18.7	18.4	7.4	7.4	9.6	9.6
Nondurable Goods	56.8	56.9	18.1	18.2	7.9	8.2	14.8	14.8
Nonmanufacturing	1004.6	1006.9	726.8	732.9	75.8	76.3	119.4	119.6
Construction	79.0	77.5	69.6	68.9	6.8	6.7	10.8	10.8
Transportation & Public Utilities	55.7	56.1	28.1	28.3	5.1	5.2	7.6	7.6
Wholesale and Retail Trade	279.3	279.2	205.0	204.7	25.9	25.9	38.4	37.5
Wholesale Trade	68.3	68.2	36.7	36.5	-	-	-	-
Retail Trade	211.0	211.0	168.3	168.2	-	-	-	-
Finance, Insurance & Real Estate	78.7	78.3	46.3	45.7	3.4	3.4	5.4	5.4
Services and Mining	306.3	306.2	226.7	225.1	20.4	20.4	33.8	33.4
Total Government	205.6	209.6	151.1	160.2	14.2	14.7	23.4	24.9
Federal	53.5	53.2	71.8	71.7	2.1	1.9	6.8	6.8
State	65.4	65.5	15.4	18.6	4.4	4.7	4.5	4.3
Local	86.7	90.9	63.9	69.9	7.7	8.1	12.1	13.8

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
OFFICE OF LABOR MARKET ANALYSIS AND INFORMATION
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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

JULY, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	JULY	JUNE*	JULY	JUNE*	JULY	JUNE*	JULY	JUNE*	JULY' 88
MARYLAND	2,614,132	2,566,764	2,511,630	2,455,688	102,502	111,076	3.9	4.3	4.6
BALTIMORE METROPOLITAN AREA	1,246,625	1,223,038	1,193,019	1,164,814	53,606	58,224	4.3	4.8	4.9
BALTIMORE CITY	357,742	352,461	334,378	326,473	23,364	25,988	6.5	7.4	7.6
ANNE ARUNDEL	223,443	218,866	216,733	211,609	6,710	7,257	3.0	3.3	3.4
BALTIMORE	403,741	396,635	389,098	379,899	14,643	16,736	3.6	4.2	4.3
CARROLL	64,596	63,253	62,914	61,427	1,682	1,826	2.6	2.9	3.0
HARFORD	85,376	82,697	81,045	79,129	4,331	3,568	5.1	4.3	4.6
HOWARD	95,504	93,313	93,127	90,926	2,377	2,387	2.5	2.6	2.8
QUEEN ANNE'S	16,221	15,813	15,724	15,352	497	461	3.1	2.9	3.3
D. C. AREA	1,037,207	1,022,531	1,006,832	987,655	30,375	34,876	2.9	3.4	3.6
CALVERT	24,081	23,756	23,194	22,753	887	1,003	3.7	4.2	5.0
CHARLES	49,929	49,057	48,465	47,542	1,464	1,515	2.9	3.1	4.0
FREDERICK	80,281	78,716	77,785	76,303	2,496	2,413	3.1	3.1	3.5
MONTGOMERY	443,938	437,295	433,059	424,810	10,879	12,485	2.5	2.9	3.0
PRINCE GEORGE'S	438,979	433,707	424,329	416,247	14,650	17,460	3.3	4.0	4.2
WESTERN MARYLAND	109,463	107,315	102,626	100,514	6,837	6,801	6.2	6.3	7.9
ALLEGANY	34,048	33,565	31,133	30,634	2,915	2,931	8.6	8.7	9.3
GARRETT	13,963	13,544	12,995	12,462	968	1,082	6.9	8.0	10.2
WASHINGTON	61,452	60,206	58,498	57,418	2,954	2,788	4.8	4.6	6.6
BALANCE OF STATE	220,835	213,879	209,152	202,706	11,683	11,173	5.3	5.2	6.0
CAROLINE	14,238	14,419	13,739	13,840	499	579	3.5	4.0	4.2
CECIL	37,101	35,865	33,607	33,660	3,494	2,205	9.4	6.1	8.6
DORCHESTER	18,345	17,785	16,816	16,527	1,529	1,258	8.3	7.1	8.9
KENT	9,656	9,333	9,118	8,986	538	347	5.6	3.7	10.0
ST. MARY'S	40,583	39,067	38,943	37,190	1,640	1,877	4.0	4.8	4.9
SOMERSET	12,230	12,475	11,450	11,309	780	1,166	6.4	9.3	7.5
TALBOT	17,228	16,937	16,676	16,303	552	634	3.2	3.7	2.6
WICOMICO	41,710	41,291	39,789	38,934	1,921	2,357	4.6	5.7	5.9
WORCESTER	29,744	26,707	29,014	25,957	730	750	2.5	2.8	3.2
UNITED STATES [1]	126,238,000	125,569,000	119,502,000	118,719,000	6,736,000	6,850,000	5.3	5.5	5.5

*Estimates for the state are revised.

1 Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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Maryland
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LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

August, 1989

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
AUGUST, 1989

MARYLAND

As seasonal economic activity began winding down in August, Maryland's civilian labor force declined by 46,898, to 2,568,734 persons. Last year the slowdown between July and August was slightly less. With students and other seasonal workers starting to leave summer jobs, and the loss of thousands of striking communications workers in the telephone industry, resident employment dropped by 43,895 to 2,469,834. Unemployment was reduced by 3,003 to 98,900 persons as some left the labor force and others were recalled from temporary layoffs. The unemployment rate remained steady at 3.9 percent.

Compared with last August, the state's labor force has swelled by almost 86,000, with about 92,000 more Marylanders employed and over 11,000 fewer unemployed. Last August's jobless rate stood at 4.4 percent of the labor force.

The U.S. unemployment rate fell to 5.1 percent in August, down from 5.3 percent in July. As was the case in Maryland, both the employment and unemployment components of the labor force declined. Joblessness improved from last August's rate of 5.4 percent.

	August 1989	July 1989	August 1988
Civilian Labor Force	2,568,734	2,615,632	2,482,842
Total Employment	2,469,834	2,513,729	2,372,706
Total Unemployment	98,900	101,903	110,136
Unemployment Rate	3.9	3.9	4.4
National Civilian Unemployment Rate	5.1	5.3	5.4

Depressed by a major strike in the telephone communications industry, nonfarm employment declined by 12,600 in August. The strike, which lasted through most of August, affected employment levels throughout the state. Other industry trends were mixed, with losers outnumbering gainers.

According to the monthly establishment survey, manufacturing netted a total of 700 jobs in August. Durable goods payrolls decreased by 200, in part due to a temporary layoff in machinery production. Nondurable goods factories added 900, with recalls in apparel and textile products, and rubber and plastic products. Nonmanufacturing employment dropped 13,300 over the month. Gains were reported in construction (+600), wholesale trade (+100), and state government (+100). Losses occurred in transportation, communication, and public utilities (-9,000), retail trade (-900), finance, insurance, and real estate (-100), federal government (-500), and local government (-3,600), which was diminished by reductions in education employment. Both mining and services were unchanged over the month.

Compared with August 1988, nonfarm employment has risen by 31,900. All growth occurred among nonmanufacturers, as manufacturing jobs were reduced by 4,200. The entire loss was absorbed by producers of durable goods, particularly in transportation equipment, electrical and electronic equipment, and machinery. Nondurables employment was flat. Nonmanufacturing jobs rose by 23,500 over the year. Services, (especially health services) was the top growth area. Other advancing industries included government, wholesale and retail trade, and finance, insurance, and real estate. Declines were observed in transportation, communication, and public utilities (strike-related), construction, and mining.

The average workweek for production workers in manufacturing remained unchanged at 41.4 hours in August. A slight increase in weekly hours among durable goods workers was eliminated by a marginal decrease in nondurable goods work hours. In the Baltimore Metropolitan Area hours for production workers rose 0.4 of an hour to 41.5 hours.

Weekly earnings for manufacturing payrolls rose to $456.23 in August, up from $452.09 in July, mainly reflecting an increase in hourly earnings. Hourly pay averaged $11.02 in August, up from $10.92 in July. Durable goods workers earned an average of $11.66 per hour, compared with earnings of $10.35 per hour in nondurable goods. Hourly wages ranged from a low of $7.19 in apparel and textile products to a high of $15.33 in primary metal industries. In the Baltimore area average weekly earnings climbed from $472.24 in July to $477.67 in August, as both weekly hours and hourly earnings increased marginally. Hourly pay rose $0.02 to $11.51.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
AUGUST 1989

Major Industry Group	August 1989	July 1989	August 1988
Total Nonagricultural Employment	2123.0	2135.6	2103.7
Manufacturing	207.3	206.6	211.5
Durable Goods	108.9	109.1	113.1
Nondurable Goods	98.4	97.5	98.4
Nonmanufacturing	1915.7	1929.0	1892.2
Mining	1.7	1.7	1.8
Construction	167.2	166.6	168.2
Transportation, Communication, and Public Utilities	87.1	96.1	96.7
Wholesale and Retail Trade	545.7	546.5	539.2
Wholesale Trade	115.0	114.9	112.1
Retail Trade	430.7	431.6	427.1
Finance, Insurance, and Real Estate	134.5	134.6	132.4
Services	587.2	587.2	572.3
Total Government	392.3	396.3	381.8
Federal	133.9	134.4	132.1
State	89.1	89.0	87.9
Local	169.3	172.9	161.8

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
AUGUST 1989

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Aug. 1989	July 1989	Aug. 1989	July 1989	Aug. 1989	July 1989
MARYLAND						
Manufacturing	41.4	41.4	$456.23	$452.09	$11.02	$10.92
Durable Goods	42.6	42.3	496.72	488.99	11.66	11.56
Lumber and Wood Products	39.5	39.9	334.96	340.35	8.48	8.53
Furniture and Fixtures	40.7	42.2	413.51	424.53	10.16	10.06
Stone, Clay & Glass Products	46.0	45.2	516.12	493.13	11.22	10.91
Primary Metal Industries	43.0	43.0	659.19	655.75	15.33	15.25
Fabricated Metals	41.2	39.9	414.88	392.62	10.07	9.84
Machinery, Exc. Electrical	41.9	42.2	509.09	519.06	12.15	12.30
Electronic and Electrical Equipment	44.8	44.9	439.04	442.27	9.80	9.85
Transportation Equipment	41.8	40.5	609.44	575.10	14.58	14.20
Instruments and Related	39.5	39.1	382.76	373.80	9.69	9.56
Miscellaneous Manufacturing Indus.	39.4	39.0	348.69	349.05	8.85	8.95
Nondurable Goods	40.3	40.4	417.11	414.10	10.35	10.25
Food and Kindred Products	41.4	42.4	398.27	409.58	9.62	9.66
Apparel and Textile Products	36.6	37.5	263.15	271.13	7.19	7.23
Paper and Allied Products	41.5	40.4	388.86	379.36	9.37	9.39
Printing and Publishing	38.1	37.9	484.25	466.17	12.71	12.30
Chemicals and Allied Products	42.0	42.2	527.10	515.26	12.55	12.21
Rubber and Plastic Products	43.8	43.7	402.08	406.41	9.18	9.30
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.5	41.1	$477.67	$472.24	$11.51	$11.49
Durable Goods	42.2	41.6	513.57	502.94	12.17	12.09
Nondurable Goods	40.6	40.5	434.83	436.19	10.71	10.77

REGIONAL ECONOMICS

BALTIMORE METROPOLITAN AREA

Unemployment in the Baltimore Metropolitan Area was unchanged in August, remaining at 4.3 percent. The region's labor force declined over the month, with employment dropping by 19,008, and unemployment reduced by 629. All jurisdictions experienced a decrease in employment, while unemployment either rose or fell marginally. An exception was Harford County, with a significant drop in unemployment due to recalls from two vacation shutdowns in July. Compared with August of last year, resident employment was up by nearly 42,000, unemployment down by about 4,300, and the jobless rate reduced from 4.8 percent.

Nonagricultural payroll employment in the metropolitan area fell by 8,200 in August. All losses were concentrated in nonmanufacturing, as manufacturing jobs were up by 400. Producers of durables and nondurables each added 200, partly a result of recalls in apparel and textiles, and rubber and plastics. Nonmanufacturing payrolls declined by 8,600. The biggest loss (-4,700) occurred in transportation, communication, and public utilities--a result of the aforementioned labor dispute. Local government dropped by 3,700, mostly in education. Federal employment fell by 100, while state jobs increased by 200. Other declines were recorded in construction (-300), services and mining (-300), and wholesale trade (-200). The only private sector industries to expand over the month were retail trade (+400), and finance, insurance, and real estate (+100). Since August 1988, nonfarm payrolls have increased by 8,900. Manufacturing jobs, however, were down by 3,000, almost all in durable goods. Electric and electronic equipment and transportation equipment producers accounted for virtually all of the loss. Nonmanufacturing concerns advanced by 11,900, despite a significant drop in transportation, communication, and public utilities. Services and mining were responsible for 7 out of 10 of these new jobs, with health services a major factor. All other industry groups, with the exception of construction, grew over the year.

MARYLAND'S D.C. AREA SUBURBS

A gain of 57 unemployed, coupled with a decline of 19,897 employed, caused joblessness to climb from 2.9 percent in July to 3.0 percent in August in Maryland's Washington area suburbs. The region remained the state's lowest unemployment area, with Montgomery County, at 2.4 percent, tied with Worcester County for lowest jobless rate. Little change was noted over the month in the region's counties, with the exception of Frederick, which experienced a moderate rise in unemployment due to two temporary layoffs in durable goods factories. A year ago area unemployment stood at 3.5 percent. About 41,000 fewer residents were employed, while almost 4,400 more were unemployed.

Nonfarm payroll employment dropped by 6,300 in August, with manufacturing down by 1,000 and nonmanufacturing reduced by 5,300. Durable goods payrolls fell by 800, in part due to layoffs in primary metals and machinery production. Nondurable goods employment decreased by 200, affected by a slight drop in printing and publishing. Among nonmanufacturers, a sizable loss occurred in transportation, communication, and public utilities (-3,900), with lesser declines apparent in local government (-1,300), services and mining (-600), and retail trade (-200). Gains were recorded in construction (+100), wholesale trade (+300), finance, insurance, and real estate (+100), federal government (+100), and state government (+100). Since last August, at-place employment has risen by 11,000. Manufacturers lost a total of 300, as an expansion in nondurable goods were negated by a decline in durables. Nonmanufacturers added 10,600, despite a considerable reduction in transportation, communication, and public utilities employment. As for the remaining industry divisions, healthy employment growth during the past year was the norm.

WESTERN MARYLAND

Unemployment fell from 6.2 to 5.8 percent in Western Maryland, as the region reached its lowest level of unemployment for August this decade. Recalls from two July layoffs helped improve the monthly picture. Although the number of employed residents dropped by 2,043, the jobless rolls were also reduced by 630. Last August unemployment registered 6.9 percent of the labor force. Over 1,000 more area residents were unemployed, while about 3,700 fewer held jobs. Despite this positive trend, the western counties remain the state's highest unemployment area. Allegany posted the top jobless rate for the state in August, with Garrett second.

Nonfarm payroll employment was at a standstill in Western Maryland in August. A gain of 300 jobs in manufacturing was eliminated by an equal loss in nonmanufacturing. The rise in factory employment occurred among producers of nondurable goods, mostly a result of recalls in apparel and textiles. Advancing industries also included construction (+100), and federal government (+100). Employment was down over the month in transportation, communication, and public utilities (-200), wholesale and retail trade (-100), state government (-100), and local government (-100). Compared with last August, nonagricultural jobs have increased by a total of 800. Manufacturing, however, was down by 400, led by a drop in transportation equipment employment. Nonmanufacturing payrolls rose by 1,200, with gains in all industry groups except local government and transportation, communication, and public utilities, both of which declined.

BALANCE OF STATE

The labor force declined in the Balance of State region in August, as the number of employed dropped by 3,578, and the number of unemployed fell by 1,801. This sizable reduction in the jobless ranks, due primarily to recalls from several manufacturing layoffs, caused the area's unemployment rate to fall from 5.2 to 4.5 percent. Trends among the region's counties were mixed, however, as new layoffs raised joblessness in some areas. Unemployment was up notably in Talbot, Caroline, and Wicomico Counties, with temporary layoffs in manuacturers of machinery and equipment, glass products. and chemicals and allied products, along with a permanent closing of a packaging firm. Cecil and Dorchester Counties, however, posted significant decreases in unemployment, with recalls in two food processors and one electronics firm, as well as a return to work in the auto industry in Wilmington, Delaware. As compared with last August, the region has improved from a 5.3 percent jobless rate, has over 6,200 more residents working, and about 1,500 fewer unemployed.

The August establishment survey reported a decline of 1,300 nonfarm jobs in the Balance of State area. Manufacturing showed a net loss of 200 jobs, as nondurable goods was up 100, and durable goods down 300, mainly a result of a drop in electrical and electronics equipment. Nonmanufacturing payrolls fell by 1,100, with local government (+100), the only growth area. Declining industries were led by transportation, communication, and public utilities (-500), followed by wholesale and retail trade (-400), services and mining (-200), and construction (-100). Finance, insurance, and real estate, and federal and state governments, were all unchanged over the month. Since August 1988, nonfarm employment has decreased by 500. The entire loss occurred in manufacturing, as nonmanufacturing overall was flat. Among manufacturers, both durables and nondurables were down, with reductions in electrical and electronics employment a factor. In nonmanufacturing, services was the top gainer, with health services up significantly. Both federal and state government jobs also rose, while the remaining nonmanufacturing groups either declined or were unchanged.

NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--AUGUST 1989

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Aug.1989	July 1989	Aug.1989	July 1989	Aug.1989	July 1989	Aug.1989	July 1989
Total Nonagricultural Employment	1127.1	1135.3	757.0	763.3	90.5	90.5	143.1	144.4
Manufacturing	130.4	130.0	35.8	36.8	15.6	15.3	24.4	24.6
Durable Goods	73.6	73.4	17.8	18.6	7.4	7.4	9.4	9.7
Nondurable Goods	56.8	56.6	18.0	18.2	8.2	7.9	15.0	14.9
Nonmanufacturing	996.7	1005.3	721.2	726.5	74.9	75.2	118.7	119.8
Construction	78.8	79.1	69.7	69.6	7.0	6.9	10.8	10.9
Transportation & Public Utilities	51.1	55.8	24.2	28.1	4.8	5.0	7.1	7.6
Wholesale and Retail Trade	278.9	278.7	205.0	204.9	25.9	26.0	38.2	38.6
Wholesale Trade	68.1	68.3	36.9	36.6	-	-	-	-
Retail Trade	210.8	210.4	168.1	168.3	-	-	-	-
Finance, Insurance & Real Estate	79.0	78.9	46.4	46.3	3.4	3.4	5.4	5.4
Services and Mining	305.5	305.8	226.4	227.0	20.4	20.4	33.6	33.8
Total Government	203.4	207.0	149.5	150.6	13.4	13.5	23.6	23.5
Federal	53.3	53.4	71.7	71.6	2.2	2.1	6.8	6.8
State	65.7	65.5	15.5	15.4	4.0	4.1	4.5	4.5
Local	84.4	88.1	62.3	63.6	7.2	7.3	12.3	12.2

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the munth.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previcus month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

MARYLAND DEPARTMENT OF ECONOMIC AND EMPLOYMENT DEVELOPMENT
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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

AUGUST, 1989

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	AUGUST	JULY*	AUGUST	JULY*	AUGUST	JULY*	AUGUST	JULY*	AUG. '88
MARYLAND	2,568,734	2,615,632	2,469,834	2,513,729	98,900	101,903	3.9	3.9	4.4
BALTIMORE METROPOLITAN AREA	1,227,999	1,247,636	1,175,280	1,194,288	52,719	53,348	4.3	4.3	4.8
BALTIMORE CITY	353,101	358,075	329,406	334,734	23,695	23,341	6.7	6.5	7.4
ANNE ARUNDEL	220,228	223,597	213,510	216,963	6,718	6,634	3.1	3.0	3.4
BALTIMORE	397,916	404,070	383,312	389,512	14,604	14,558	3.7	3.6	4.2
CARROLL	63,565	64,638	61,979	62,981	1,586	1,657	2.5	2.6	2.7
HARFORD	83,161	85,421	79,840	81,131	3,321	4,290	4.0	5.0	4.2
HOWARD	94,125	95,607	91,743	93,226	2,382	2,381	2.5	2.5	3.0
QUEEN ANNE'S	15,904	16,228	15,490	15,741	414	487	2.6	3.0	2.9
D. C. AREA	1,017,836	1,037,676	987,583	1,007,480	30,253	30,196	3.0	2.9	3.5
CALVERT	23,637	24,094	22,751	23,209	886	885	3.7	3.7	4.8
CHARLES	48,929	49,938	47,539	48,497	1,390	1,441	2.8	2.9	3.7
FREDERICK	79,146	80,311	76,298	77,835	2,848	2,476	3.6	3.1	3.5
MONTGOMERY	435,346	444,177	424,779	433,337	10,567	10,840	2.4	2.4	2.9
PRINCE GEORGE'S	430,778	439,156	416,216	424,602	14,562	14,554	3.4	3.3	4.1
WESTERN MARYLAND	106,758	108,801	100,598	102,011	6,160	6,790	5.8	6.2	6.9
ALLEGANY	32,973	33,808	30,420	30,910	2,553	2,898	7.7	8.6	8.6
GARRETT	13,742	13,864	12,791	12,910	951	954	6.9	6.9	8.3
WASHINGTON	60,043	61,129	57,387	58,191	2,656	2,938	4.4	4.8	5.7
BALANCE OF STATE	216,138	221,517	206,371	209,949	9,767	11,568	4.5	5.2	5.3
CAROLINE	14,209	14,298	13,612	13,802	597	496	4.2	3.5	4.5
CECIL	35,781	36,965	33,857	33,541	1,924	3,424	5.4	9.3	8.1
DORCHESTER	17,416	18,431	16,646	16,899	770	1,532	4.4	8.3	5.4
KENT	9,270	9,692	8,957	9,166	313	526	3.4	5.4	4.7
ST. MARY'S	39,960	40,758	38,405	39,128	1,555	1,630	3.9	4.0	4.7
SOMERSET	11,954	12,283	11,228	11,512	726	771	6.1	6.3	5.7
TALBOT	17,082	17,303	16,282	16,754	800	549	4.7	3.2	4.7
WICOMICO	41,592	41,901	39,202	39,990	2,390	1,911	5.7	4.6	5.5
WORCESTER	28,874	29,886	28,182	29,157	692	729	2.4	2.4	2.8
[1] UNITED STATES	125,444,000	126,238,000	119,092,000	119,502,000	6,352,000	6,736,000	5.1	5.3	5.4

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

Maryland
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